



Publishing and Education Council (PEC)

Tuesday, June 25, 2024

Minutes

<u>Voting Members</u>		<u>Position</u>	<u>Guests</u>
Billy Austin		Chair	Tim Kline
Chandra Sekhar		Vice Chair	Heather Kennedy
Mark Tome		Director/ExO Cert	Cindy Michaels
John Constantinide		Director/ExO HBC	Greg Martin
Arthur Giesler		Director/ExO Hist	Karen Murray
Blake Ellis		Director/ExO Pubs	David Soltis
Doug Cochrane		Director/ExO TEC	Drew Champlin
Suzanne LeViseur		Past Certification	
Megan Tosh		Past Handbook & Publications Vice Chair	Jonathan Smith
Adeeba S W Mehboob		Past Publications	Jeff Spitler
Jason Alphonso		Past TEC	Duncan Macauley
<u>Non-Voting Members</u>			Ken Fulk
Nicholas Armstrong		Certification Chair	John Patton
Suz Ann M Arroyo - absent		Certification Vice Chair	Jeremy Smith
Harris Sheinman - absent		Handbook Chair	Kimberly Cowman
Joseph L Furman		Handbook Vice Chair	Jason Biswell
Robert Thomas Pollard		Historical Chair	Patrick Marks
Norman Grusnick - absent		Historical Vice Chair	
Vinay Ananthachar		Publications Chair	
Jesse Fisher		TEC Chair	
Tim Ashby		TEC Vice Chair-Operations	
Kimberly Pierson		TEC Vice Chair-Planning	
Mark Owen		Staff PEC Liaison	

Additional Distribution:

Jeff Littleton, Executive Vice President, Candace Denton,
ASHRAE Staff Directors, Publications & Education Managers

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Action Items
Meeting of June 25, 2024

No.	Responsible	Action Item
1	Staff	Post approved January 23, 2024, Chicago Winter Meeting minutes to the PEC page of the ASHRAE website and update the PEC Basecamp.
2	Staff	Add the ASHRAE Global Training volunteer oversight committee (AGT) to the PEC Subcommittee and Committee Structure chart and post to Basecamp and include in the PEC Reference Manual.

Motions
Meeting of June 25, 2024

No.	Page	Motion
1	4	Approved the draft minutes as distributed for the January 23, 2024, Chicago Winter Meeting. Approved 10-0-0 CNV
2	7	Approved creating a unified learning platform to support ASHRAE eLearning, instructor-led training, and self-directed learning offerings and enhance the user experience for ASHRAE members and the wider public, funded by the General Reserve Fund. Approved 10-0-0 CNV
3	10	Approved referring the following motion to the Memberships Model Ad Hoc Committee: Keep Handbook Online a member benefit option. Do not convert it to a universal member benefit. Keep the status quo. Approved 10-0-0 CNV
4	11	Approve referring the following motion to the Memberships Model Ad Hoc Committee: Recommend that Handbook Online is identified as the default Member Benefit option so that members will receive a Handbook Online subscription if no Member Benefit option is selected upon membership renewal. Approved 10-0-0 CNV
5	11	Approved and recommended BOD approve changes to the Publications Committee's section of the ASHRAE Rules of the Board (ROB) Attachment G of the Planning Subcommittee Report to PEC. <i>Changes reflect the need to include mention of the annual Journal Paper Award and to include another missing member task (communicating with the TC leadership), as well as a minor editorial change to the listing of Special Publications.</i>

Approved 10-0-0 CNV

1. Call to Order

Mr. Austin called the meeting to order at 8:03 a.m.

2. ASHRAE Value Statement

Mr. Austin reviewed the ASHRAE Value Statement with the council members.

In ASHRAE meetings, we will act with honesty, fairness, courtesy, competence, inclusiveness and respect for others, which exemplify our core values of excellence, commitment, integrity, collaboration, volunteerism and diversity, and shall avoid all real or perceived conflicts of interest. Our culture is one of inclusiveness, acknowledging the inherent value and dignity of each individual. We celebrate diverse and inclusive communities, understanding that doing so fuels better, more creative and more thoughtful ideas, solutions and strategies for the Society and the communities our Society serves. We respect and welcome all.

Code of Ethics - <https://www.ashrae.org/about/governance/code-of-ethics>

Core Values - <https://www.ashrae.org/about/ashrae-s-core-values>

Diversity Statement - <https://www.ashrae.org/about/diversity-equity-and-inclusion-dei>

3. Introductions

Members and guests introduced themselves. Council, Subcommittees and Committees Rosters are posted to the PEC Basecamp account for review.

Subcommittee and Committee Rosters have been posted to the PEC Basecamp account for review.

4. Review of Agenda

Mr. Austin reviewed the agenda with the council for any additions.

5. Previous Meeting Minutes Review for Approval

The Draft Minutes have been posted to the PEC Basecamp account for review.

It was moved and seconded:

- (1) Approved the draft minutes as distributed for the January 23, 2024, Chicago Winter Meeting.**

MOTION (1) Approved 10-0-0, CNV

An action item was assigned to staff to post approved minutes to the PEC page of the ASHRAE website and update the PEC Basecamp. **(ACTION ITEM 1)**

6. PEC Committee Structure (Attachments A)

Mr. Austin reviewed the PEC reporting structure with council members. An action item was assigned to staff to add the ASHRAE Global Training volunteer oversight committee (AGT) to the chart and post to Basecamp and include in the PEC Reference Manual. **(ACTION ITEM 2)**

7. Review of Motions from last PEC Meeting

Mr. Owen reviewed PEC motions from the January 23, 2024, Chicago Winter Meeting.

No.	Page	Motion
1		Approved the draft minutes as distributed for the meeting of June 27, 2023, in Tampa, FL. Approved 10-0-0, CNV
2		Approved an additional \$6,000 to the Historical Committee budget to review ASHRAE Headquarters existing historical documents. Approved 10-0-0, CNV

8. Review of Action Items from last PEC Meeting

Mr. Owen reviewed PEC motions from the January 23, 2024, Chicago Winter Meeting.

No.	Responsible	Action Item
1	Staff	Add standing committees' assignment columns to PEC MOB spreadsheet. Complete
2	Staff	Send out poll to PEC Vice Chair and PEC standing Committee Vice Chairs for a virtual meeting to coordination next 2024-2025 MBOs. Complete
3	Staff	Add a recurring item "CRC Roundtables and New Products" to Products and the Professional Development Subcommittees future agendas. Complete

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- | | | |
|-----------------|---|---|
| 4 | Staff | List AGT in the appropriate area of the PEC structure slide. |
| Complete | | |
| 5 | Certification, HBC, Historical, Publications, TEC | Review committees MOPs and Reference Manuals then forward any changes to SRC in track changes before the Annual Conference. |
| Complete | | |
| 6 | PEC Planning Subcommittee | Review PEC MOP and Reference Manual to forward any changes to SRC in track changes before the Annual Conference. |
| Complete | | |
| 7 | Certification, HBC, Historical, Publications, TEC | Include MBO development as an item on future agendas for finalizing before the annual meeting. |
| Complete | | |
| 8 | Staff | Include MBO development as an item on future PEC Planning Subcommittee agendas finalizing before the annual meeting. |
| Complete | | |
| 9 | Staff | Include PEC DEI as an agenda item on future PEC agendas. |
| Complete | | |
| 10 | Austin | Request qualification criteria Executive Committee for nominating members. |
| Complete | | |
| 11 | Staff | Include items for liaisons to CT ² , GAC, and GTIC on future PEC agendas. |
| Complete | | |

9. Review of PEC MBO

Mr. Austin reviewed the PEC MBOs with the council members shown in Attachment B.

10. Subcommittee Reports

Explanatory Note: Handbook Committee (HBC), Historical Committee and Publications Committee reports to PEC Products Subcommittee. Certification Committee and Training & Education Committee (TEC) report to PEC Professional Development Subcommittee. PEC Products and Professional Development Subcommittees report to PEC Fiscal and Planning Subcommittees. All reports are posted to the PEC Basecamp account for council review.

10.1 Fiscal (Attachments C)

Mr. Austin gave the PEC Fiscal Subcommittee Report.

(Fiscal Motions for PEC consideration from all PEC Subcommittees and Standing Committees)

It was moved and seconded:

- (2) To create a unified learning platform to support ASHRAE eLearning, instructor-led training, and self-directed learning offerings and enhance the user experience for ASHRAE members and the wider public, funded by the General Reserve Fund.**

Background: Currently, ASHRAE offers a rich array of educational resources across these three distinct categories. While the quality of content and instructor expertise are widely recognized, the committee believes there is room for improvement in the accessibility and user-friendliness of the training offerings.

The existing system requires individuals interested in ASHRAE training to navigate multiple webpages, each dedicated to a specific training type. Furthermore, these trainings must be purchased separately based on their respective learning categories. This fragmented approach presents several challenges:

1. Inefficiency: Members and the public must spend unnecessary time navigating different pages to find the training they need.
2. Complexity: The current structure can be confusing, leading to missed opportunities for skill development for users and missed purchases for ASHRAE.
3. Frustration: Potential learners may be discouraged by the complexity of the process, resulting in lost opportunities for both ASHRAE and individuals seeking professional development. Feedback from the CRCs roundtable is that guidance is needed in how to navigate through ASHRAE's technical resources and educational offerings.

To address these issues and provide a more user-centric learning experience, the Training and Education Committee (TEC) proposes the creation of a unified ASHRAE learning platform. The platform would consolidate ASHRAE eLearning, instructor-led training, and self-directed learning into a single, user-friendly web-based platform. The new platform will replace the existing website pages members currently use to find and purchase the various types of training.

Key features and benefits of the proposed ASHRAE learning platform:

1. Centralized Access: Users can access all types of ASHRAE training from a single location, streamlining the process of finding relevant courses.
2. Seamless Registration and Purchase: Individuals can conveniently register for and purchase different types of training from a single source/provider, reducing administrative burdens and simplifying payments.
3. Personalized Learning Paths: The platform will allow users to create personalized learning paths, tracking their progress and recommending additional courses based on their interests and needs. ASHRAE can also provide learning paths for each of the

ASHRAE Certifications, potentially increasing the use of learning courses and the applications for certifications.

4. Enhanced Search and Filter Functions: Robust search and filter options will make it easier for users to find the precise training they want. This includes being able to filter and search for learning materials that correspond to an ASHRAE Certification.
5. Feedback and Assessment: Interactive features will enable users to provide feedback and evaluate the quality of courses, contributing to ongoing improvement.
6. Community and Collaboration: The platform will also foster a sense of community and facilitate collaboration among ASHRAE members and learners.

The new single platform for training will allow ASHRAE to promote several types of training in a single location and encourage members and nonmembers to obtain the content in a format that matters to them. Increased use/purchase of courses and training may also encourage new courses and instructors, increasing the already rich ASHRAE training portfolio.

TEC believes that the creation of this unified ASHRAE learning platform aligns with ASHRAE's mission to advance the arts and sciences of heating, ventilation, air conditioning, and refrigeration. Making ASHRAE educational resources more accessible and user-friendly will empower industry professionals and enthusiasts to effectively achieve their learning goals.

TEC kindly requests your approval and support to make this vision a reality, benefiting ASHRAE members and the broader HVAC&R community.

Thank you for considering this proposal. We look forward to discussing this initiative further and working together to improve ASHRAE's training offerings.

Fiscal Impact: The cost to implement the project is a one-time cost of \$109,000 to build out the new unified learning website. There is a projected annual increase of \$40,000 for the hosting platform starting in year two. By streamlining and consolidating the hosting and check out process there is an expected increase in revenue and sales. Implementation would also result in a reduction in demand on ASHRAE staff.

Expected Benefits

- An increase is expected in revenue from a streamlined offering that simplifies the navigation of offerings and the checkout process. Any specific numbers are conjecture but we do believe that the increased revenue will more than offset the increased cost.
- Currently collection of data on sales and users is difficult to correlate and use. A unified platform would allow for better data collection and more targeted marketing to drive additional sales.
- A considerable amount of staff time will be saved through automation on the new platform. The estimated savings are \$20,000 annually in staff time after implementation and an additional 500 hours per year available for staff to spend on other priorities and projects that are currently not getting the attention they deserve.

(Professional Development Subcommittee approved unanimously, 9-0-0, CV; Fiscal Subcommittee approved unanimously, 9-0-0, CV)

MOTION (2) Approved 10-0-0, CNV

Mr. Austin also report on PEC standing committee information items.

Certification Committee reported a record 700+ applications in 2023-24 were received. This is a 45% increase over the 2022-23 near record total of 482 applications.

Certification Committee reported over 100 applications have been received since March 1, 2024, for the Certified Decarbonization Professional (CDP) certification which will administer the first CDP certification exams beginning June 25, 2024.

Certification Committee reported over 1,100 study guides have either been sold or selected as a renewing full Member benefit through May 31, 2024. The three guides are:

- Certification Study Guide: Certified HVAC Designer (CHD)
- Certification Study Guide: Building Commissioning Professional (BCxP)
- Certification Study Guide: Building Energy Modeling Professional (BEMP)

Certification Committee reported ANSI National Accreditation Board (ANAB) granted an additional year of continued accreditation under the ISO/IEC 17024:2012 accreditation standard.

Certification Committee reported the 2024-27 Exam Subcommittee Members approved a slate of nominees and alternates for seven Exam Subcommittees for the 2024-27 term from a pool of 86 self-nominations.

Training and Education (TEC) reported ten ALI courses are scheduled with the 2024 ASHRAE Annual Conference. The combined registration total to date is 111, compared to 111 in 2023 (Tampa) and 76 in 2022 (Toronto). Combined course revenue in Indianapolis is about \$25k compared to about \$16k in Tampa.

TEC reported eLearning revenue through May 2024 has already surpassed the 2022-2023 fiscal year performance.

TEC reported 1,776 individuals chose the eLearning membership benefit in July 2023- June 2024 compared to 2,334 1in July 2022-June 2023.

TEC completed the first year of the course reaffirmation process with approximately 20% of the existing ALI courses being reviewed and either reaffirmed, updated, or sunset. The course catalog will continue to cycle through the reaffirmation process to ensure the ASHRAE education content is up to date and of a consistently high quality.

TEC has selected Healthy Buildings as the next learning pathway with development of the pathway to be done by ASHRAE staff.

TEC reported new courses are being developed for building decarbonization in conjunction with CEBC and one on refrigerants will be developed at the request of ASHRAE BOD.

Handbook Committee (HBC) reported adding the following to the Handbook Authors and Revisors Guide:

ASHRAE's current position is not to use generative Artificial Intelligence (AI) when editing, revising, creating or modifying the ASHRAE Handbook volume chapters. Recommend PEC request TAC to notify Handbook committee when TCs merge or become inactive and to notify Handbook what Handbook chapters the affected TCs are responsible for and the status of the continuation of the chapters, e.g. obsolete, transfer to another TC.

Historical Committee reviewed the purpose and scope of the Historical Committee, as well as the PEC organization and reporting structure.

Historical Committee has some members that have indicated they could volunteer go to Atlanta Headquarters to review the library archives for material for possible inclusion in the Engineering and Technology History Wiki (ETHW) as well as to start to look at, sort and organize some items for an initial review of what is in storage.

Historical Committee Chair reminded committee members that Wednesday, June 26, 2024, is ASHRAE and UNEP will recognize World Refrigeration Day 2024 (WRD 2024). The theme this year is "Temperature Matters". <http://ashrae.org/unep-wrd>

Research Journal Subcommittee reported some highlights from Editor's Report:

- The rejection rate (68%) is about three times what we accept (26%).
- The goal is to move Scholar One from being hosted by ASHRAE to Taylor & Francis. There was some discussion during the meeting concerning the logistics of making the transfer. This will assist in the move towards Format Free submission.
- There have been more discussions related to posting on social media about articles. The Editor is thinking about adding a Social Media Manager. There was a suggestion that if someone was identified, they could coordinate with the ASHRAE marketing department to assist in STBE social media marketing.

Research Journal Subcommittee reported some highlights from Publisher's (Taylor and Francis) Report:

- Top 10 downloads have increased.
- Annual downloads are down slightly (-2%) and are holding steady.
- The backlog has doubled in the last six months.
- Cite Score number is now 4.3 vs. LY 3.7, an increase of 16%.
- The data for the Impact Factor is not out yet, but there are several positive signs (like the Cite Score) that it should go up.

10.2 Planning (Attachments D)

Mr. Sekhar gave the PEC Planning Subcommittee Report.

(Planning Motions for PEC consideration from all PEC Subcommittees and Standing Committees)

Products Subcommittee sent two motions to both the Planning and Fiscal Subcommittees for their consideration and approval. After some discussion, Planning Subcommittee deferred a vote and suggests the motion be combined and/or reworded after Fiscal Subcommittee's review of the fiscal impact.

It was moved and seconded:

- (3) **Approve referring the following motion to the Memberships Model Ad Hoc Committee:**

Keep Handbook Online a member benefit option. Do not convert it to a universal member benefit. Keep the status quo.

Background: HBC notes that a proposal from grassroots meetings, reported to PEC, indicates a preference to convert Handbook Online from a member benefit option to a universal member benefit. HBC believes that, given the global trend toward monetized subscriptions of electronic products, de-values the Handbook Online product. Hiding the cost within Society membership fees is a step that cannot ever be reversed.

HBC brought this motion to the PEC Products Subcommittee for their consideration, vote, and recommendation to the PEC Planning Subcommittee. After some discussion, Planning Subcommittee deferred a vote and suggests the motion be combined and/or reworded after Fiscal Subcommittee's review of the fiscal impact. (*Products Subcommittee Approved deferral 4-2-0 CV*)

Fiscal Impact: TBD

After some discussion, council members decided to refer the motion to the Membership Models Ad Hoc Committee.

MOTION (3) Approved 10-0-0, CNV

It was moved and seconded:

- (4) **Approve referring the following motion to the Memberships Model Ad Hoc Committee:**

Recommend that Handbook Online is identified as the default Member Benefit option so that members will receive a Handbook Online subscription if no Member Benefit option is selected upon membership renewal.

Background: Handbook Online provides the most current and complete product for all Handbook volumes. As industry transitions to electronic and web versions of publications, this default option will increase usage of Handbook Online. Staff Impact should be minimal. (*Products Subcommittee Approved deferral 4-2-0 CV*)

Fiscal Impact: TBD

After some discussion, council members decided to refer the motion to the Membership Models Ad Hoc Committee.

MOTION (4) Approved 10-0-0, CNV

It was moved and seconded:

- (5) PEC recommends the BOD approve changes to the Publications Committee's section of the ASHRAE Rules of the Board (ROB) as shown below:**

2.419 PUBLICATIONS COMMITTEE

2.419.001 SCOPE AND PURPOSE

This committee identifies the technical information needs of the HVAC&R industry not met through the ASHRAE Handbook series, ASHRAE's research journal, standards, guidelines, or user's manuals and oversees editorial policies and delivery of products to the marketplace. This committee also determines the best paper published in the volume year of *ASHRAE Journal* preceding the ASHRAE Winter Conference.

2.419.002 MEMBERSHIP

2.419.002.1 Composition

The members of this committee are as follows:

- A. Twelve (12) voting members, including a chair and a vice chair. (16-06-29-20)
- B. Non-voting members include a Board ex officio member and coordinating officer.

2.419.002.2 Qualifications

- A. All members of the committee shall hold the grade of Associate Member or higher in the Society.
- B. Members should have an awareness of the current technical information needs of various segments of the HVAC&R industry.
- C. Membership should include broad representation from the HVAC&R industry including the academic, design, construction, facility operations and manufacturing communities.
- D. At least three members should have recent experience with the production or writing of technical publications or periodicals.

2.419.002.3 Term of Service

The term of service for voting members is intended to be three (3) years.

2.419.003 OPERATION

2.419.003.1 General Requirements

A. This committee shall oversee the editorial policies of ASHRAE's Special Publications, *ASHRAE Transactions* and other conference proceedings, *ASHRAE Journal*, and ASHRAE's electronic newsletters. The committee shall be subject to these conditions:

1. The data recommended for publication shall tend toward the professional education of the individual engineer;
2. Such data shall be free from commercial bias;
3. Such data shall tend to advance for the public benefit the arts and sciences relating to heating, refrigeration, air conditioning, and ventilation and the allied arts and sciences.

(67-06-25-08/82-06-30-25/86-06-22-18M)

- B. ASHRAE shall produce Special Publications that shall be defined as all technical publications in print format (except for the ASHRAE Handbook series; standards, guidelines, and user's manuals; ASHRAE's research journal, and ASHRAE's magazines), such as ~~non-series~~ books (including books resulting from ASHRAE Research Projects and Special Projects), ~~books in the Advanced Energy Design Guide series and the ASHRAE Datacom Series~~, charts, and tools, as well as all technical publications in machine-readable format, such as audio and visual presentations, software, databases, apps, and online resources. These special publications may be generated from proposals submitted directly to Publications Committee or from accepted Publication Topic Acceptance Requests (PTARs), which Publications Committee reviews before providing recommendations to Research Administration Committee (RAC) for the final vote regarding funding. [This committee shall also communicate with the cognizant TCs of existing ASHRAE publications to help staff determine whether older publications are up to date as is, need to be revised, or need to be removed from sale.](#)
- C. The objective of *ASHRAE Transactions* shall be to serve as the archival publication of unsolicited research papers and Society-sponsored research and discussions in HVAC&R technical areas presented at the ASHRAE Annual and Winter Conferences as well as of Society business such as council and committee membership and award recognition. The objective of proceedings of ASHRAE-sponsored conferences and ASHRAE cosponsored conferences shall be to serve as the archival publications of the unsolicited research papers presented at these conferences.
- D. The objective of *ASHRAE Journal* shall be to lead in communication of heating, ventilating, air-conditioning and refrigeration information to and from the profession, industry, and related interests. (ROB 520-144-007). Editorial and advertising content of *ASHRAE Journal* shall be directed toward the professional education of persons engaged in industries related to heating, ventilating, air conditioning, and refrigeration. (86-06-22-18L). [This committee shall determine the annual winner of the Journal Paper Award.](#)
- E. The objective of ASHRAE's electronic newsletters shall be to communicate news to various audiences. *Insights*, distributed to members only, includes news of members, chapters, regions, Society committees, and International Associates. (ROB 520-144-007; 86-06-22-18L) *ASHRAE Journal Newsletter*, distributed to members only, connects news of industry trends with articles from *ASHRAE Journal*'s archive of peer-reviewed content. *ASHRAE HVAC&R*

Industry News curates the latest trends and announcements from the industry to a large readership of members and non-members. *HPB Newsletter* combines online HPB articles and *ASHRAE Journal* articles with links to external articles related to energy efficiency, resiliency and sustainability for a diverse audience of ASHRAE engineers, architects, facilities managers and building owners.

2.419.004 STRATEGIC PLAN

(09-06-21-12C)

This committee shall develop procedures for recommending updates to the strategic plan on a continuous basis. As a minimum the committee shall submit a report to the council prior to the Annual Meeting. The report includes the current status of each activity which supports the fulfillment of the committee's assignments under the strategic plan. The committee shall report to the council all recommendations for changes to the strategic plan as provided by the committee's constituents prior to the Annual Meeting.

Background: These changes reflect the need to include mention of the annual Journal Paper Award and to include another missing member task (communicating with the TC leadership), as well as a minor editorial change to the listing of Special Publications. (*Products Subcommittee Approved 5-0-0 CNV*) (*Planning Subcommittee Approved 5-0-0 CNV*)

Fiscal Impact: None.

Staff Impact: No changes.

MOTION (5) Approved 10-0-0, CNV

Information items reported to the PEC Planning Subcommittee can be reviewed on their separate reports:

- Handbook Committee Attachment D - Planning Subcommittee Report.
- Historical Committee Attachment E - Planning Subcommittee Report.
- Publications Committee Attachment F - Planning Subcommittee Report.
- Research Journal Subcommittee Attachment G - Planning Subcommittee Report.
- ASHRAE Roundtables Summary Report Attachment H - Planning Subcommittee Report.
- Certification Committee Attachment I - Planning Subcommittee Report.
- Training and Education Committee Attachment J - Planning Subcommittee Report.

10.3 ASHRAE Global Training (AGT)

Mr. Fisher submitted a report for the council's review shown in attachment Attachments E.

11. Liaisons with Other Groups

11.1 CT²

Mr. Austin gave a brief verbal report on CT² activities.

11.2 Government Affairs Committee (GAC)

Mr. Alphonso gave an update on GAC activities. (Attachment F)

- The GAC unanimously approved the Public Policy Priorities (PPPs) for Society Year 2024-25. These PPPs were subsequently approved by ExCom and the Board of Directors.
- The GAC set a goal of 100 Government Outreach Events to be held during Society Year 2023-2024. As of June 18, a total of 129 GOEs have been reported as being conducted in the 23-24 Society Year. These GOEs comprised 349 discrete meetings involving 375 ASHRAE members and 543 government officials.
- Mr. Alfonso reported in SY23-24, Government Affairs has submitted 60 documents (letters, testimony, and responses to Requests for Information and other regulatory proposals). To view those documents, you can visit this website. GAC gives thanks for contributions to these.
- The GAC finalized details for its “Subject Matter Experts (SMEs) for Government Outreach Events (GOEs)” Pilot Program. This pilot program identifies and recruits Subject Matter Experts (SME) within ASHRAE who can communicate technical information effectively to government officials and policymakers. The program establishes a pool of SMEs with specific expertise who would be able to provide technical support and information for government briefings, legislative testimony, and/or responses to government requests for information. SMEs will be sources of technical support for local to global government affairs work. We encourage applicants to this program, and the online application can be found here.
- The GAC unanimously approved 11 PPIBs; 10 of which were existing PPIBs that were updated, and one of which was a new PPIB, entitled “Wildfires and Indoor Environmental Health,” which was subsequently approved by ExCom.

11.3 GTIC

Mr. Austin gave a brief verbal report to council members on GTIC activities.

11.4 Handbook Volume Realignment Ad Hoc Committee (Attachment G)

Mr. Constantinide gave a report to council members on the Ad Hoc Committee’s proposal to better distribute information and page counts between the four Handbook Volumes to assist staff work load impacts and the future development of each volume.

12. Items Referred by PEC to Other Groups

None.

13. Items Referred from Other Groups to PEC

- 13.1 **Spring 2024 CRC Motion, Region XI Southern Alberta Chapter – Motion 24-11-3 (May 11, 2024):** We propose that access to the ASHRAE Handbook Online be available for all members grades.

Background: We have had several members lose access the ASHRAE Handbook Online. Having access to this body of knowledge is a huge part of being an ASHRAE member, and how we sell others to join ASHRAE.

Originally, as part of your membership dues, you'd get mailed a paper copy of each year's handbook. Then, that was removed and replaced with access to a digital online version. This online version has been removed from the standard membership benefit as well and is only available for additional purchase or as part of a 'select a benefit' available to Full Member or Associate membership grades. The Handbook Online is also available to new members for the first year.

Placing the HBO behind this 'select a benefit' gate prevents students or affiliates from accessing the handbook after their first year. These members are new to the industry and could benefit most from having access to the handbook's information and practices. It is also more difficult for these members to advocate to their boss that they should pay both their membership dues and separately to get access to the handbook. With the handbooks being so fundamental to what ASHRAE does, with publishing history going back to 1922, we feel that this should be a benefit available to all members.

Fiscal Impact:

Loss of revenue for ASHRAE Handbook Online. Active memberships currently on the decline with 7107 users and an average monthly revenue of \$4407. Potential for increased membership with this added benefit.

Comment from Staff Director of Publishing and Education: FY 2022-2023 subscription revenue for Handbook Online shows as approximately \$51,000. If 50-60% of that revenue is from members as in past patterns, the revenue loss could be \$25-30k/year.

Staff Impact: None.

CRC Vote: 16-0-0 CNV.

Note: This motion was also referred to Membership Promotion for recommendation.

14. Old Business

None.

15. New Business

15.1 Center of Excellence in Building Decarbonization (CEBD) Briefing

Mr. Ellis gave a presentation to council members as shown in Attachment H.

15.3 PEC DEI

Mr. Sekhar discussed with council members the importance and value of pursuing diverse representation on the Publishing & Education Council.

15.4. Mind-mapping exercise by PLC for PEC

Mr. Sekhar explained to council members that in the next few months a virtual meeting will be called for PEC members to participate in a Mind-mapping exercise organized by PLC for groups within ASHRAE to offer up their ideas for ASHRAE's future. By focusing on key ideas and looking for connections between them, information can be mapped to better understand the organization's future opportunities. BOD will receive reports from these sessions to help them in the development of the Strategic Plan. Mr. Sekhar introduced Mr. Jonathan Smith, in-coming member of PEC, who will be leading the exercise with the council members.

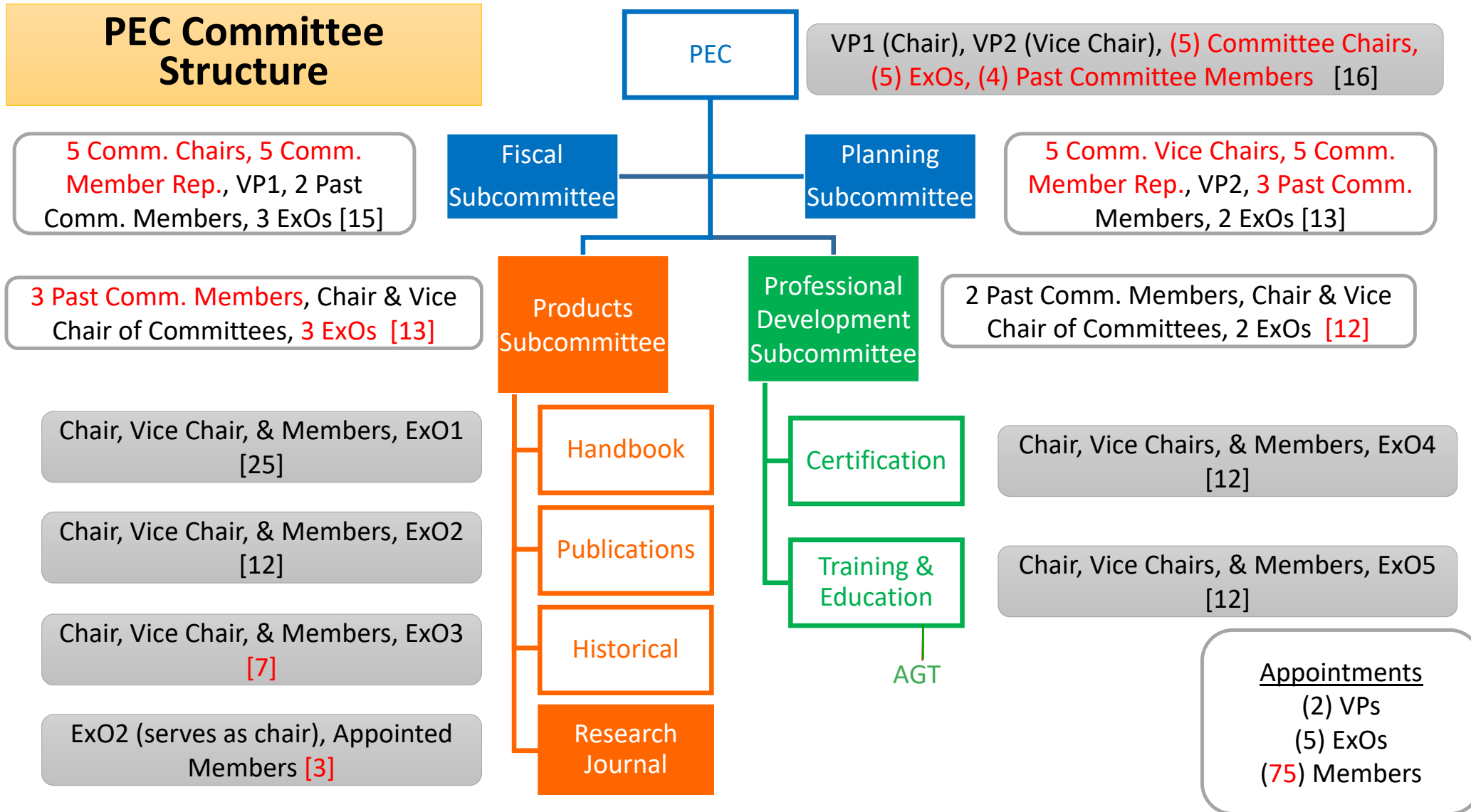
16. Adjourn

Mr. Austin adjourned the meeting at 11:31 a.m.

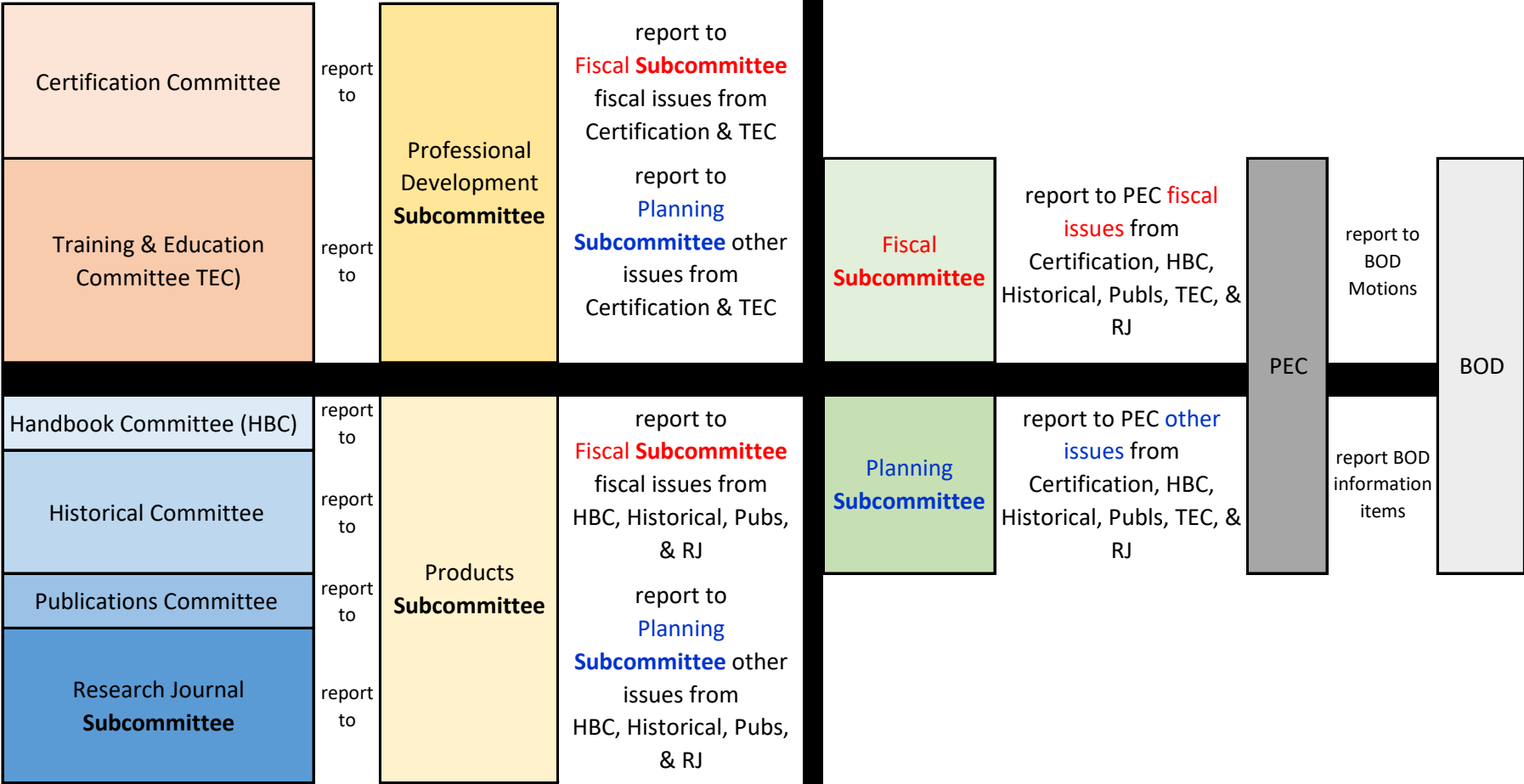
Attachments:

- A. PEC Subcommittee & Committee Structure
- B. PEC MBOs 2023-2024
- C. Fiscal Subcommittee Report to PEC
- D. Planning Subcommittee Report to PEC
- E. ASHRAE Global Training (AGT) Report to PEC
- F. Government Affairs Committee (GAC) Report to PEC
- G. Handbook Volume Realignment Ad Hoc Committee Report PEC
- H. Center of Excellence in Building Decarbonization (CEBD) Briefing
- I. PEC Report Board of Directors - Jun 2024 - Annual - Indianapolis

PEC Committee Structure



Reporting Structure



MBO Submission to Planning

DATE

Attachment B - PEC Minutes - June25, 2024 - Indianapolis

Council:

PEC

Chair: Billy Austin

Committee:

Vice-chair: Chandra Sekhar

Committee:								Vice-chair:		Chandra Sekhar		Strategic Plan Tally											
#	Description	Metric	Initiative #	Goal #	Completion % /Date	Financial Assist Req'd?	MBO Comments	Initiative #				Goal 1		Goal 2			Goal 3						
		(how do we determine success?)						1	2	3	4	a	b	a	b	c	a	b	c				
1	Create and identifying digital product strategies.	Develop a minimum of 3 digital products	2	2a,2c	6/30/2024	No			x						x		x						
2	Develop ASHRAE products and services for governmental and other non-commercial entities.	Develop ASHRAE documents for GAC outreach	4	3b	6/30/2023	No					x							x					
3	Develop new products & services aligned with Strategic Plan initiatives 1 & 2 (ETF & TFBD).	The development of at least one new product to support the work of the ETF or TFBD.	1,2	1a, 1b	6/30/2024	Yes		x	x			x	x										
4	Translate high demand products and services into languages other than English	-Translate at least one high grossing ALI course into a language other than English. -Identify up to 3 additional ALI course to be translated. -Identify potential instructors and translators. -Identify viability of translating up to 5 high grossing ASHRAE publications.	4	1a,1b	6/30/2024	No					x	x	x										
5	Create a New Products Advisory Group	Receive reports from each of the CRC roundtables; brainstorm at PEC meeting to prioritize suggestions; make recommendations to the PEC and PEC standing Committees new products and services that align with ASHRAE's strategic initiatives.	4	1a,1b	6/30/2024	No					x	x	x										
6	Coordinate with the new Strategic Planning Committee.	Receive guidance from Planning Committee on new Strategic Plan. Use information to determine new products and services.	1,2,3,4	1, 2, 3a, 3b	6/30/2024	No		x	x	x	x	x	x	x	x	x	x	x					
7	Coordinate with the new Global Technical Interaction Committee.	Receive feedback and reports from the GTI and prioritize action items. Use information to determine new products and services.	4	1a, 1b, 2a, 2b	6/30/2024	No					x	x	x	x	x								
8	Create a new PEC Nominating Committee	Nominate qualified candidates to serve on the Publishing and Education Council and/or other bodies of ASHRAE	3	3b	6/30/2024	No				x								x					
								2	3	2	5	5	5	3	2	2	1	3	0				



Fiscal Subcommittee Report to PEC

Tuesday, June 25, 2024
JW Marriott Hotel – Indianapolis, IN

PEC - Fiscal Subcommittee			
Name	SC position	Voting	Note
Billy Austin	Chair	Yes	PEC Chair
Nicholas Armstrong	Member	Yes	Certification Chair
Harris Sheinman	Member	Yes	Handbook Chair
Robert Thomas Pollard	Member	Yes	Historical Chair
Vinay Ananthachar	Member	Yes	Publications Chair
Jesse Fisher	Member	Yes	TEC Chair
Suzanne LeViseur	Member	Yes	Past Certification
Jason Alphonso	Member	Yes	Past TEC
Blake Ellis	Member	Yes	Publications ExO
Doug Cochrane	Member	Yes	TEC ExO
John Constantinide	Member	Yes	Handbook ExO
Jim Vallort	Member	Yes	Consultant/Past TEC
Mark Owen	Staff Liaison	no	Director of Publications and Education

Motion for PEC Approval

1. To create a unified learning platform to support ASHRAE eLearning, instructor-led training, and self-directed learning offerings and enhance the user experience for ASHRAE members and the wider public, funded by the General Reserve Fund.

Background: Currently, ASHRAE offers a rich array of educational resources across these three distinct categories. While the quality of content and instructor expertise are widely recognized, the committee believes there is room for improvement in the accessibility and user-friendliness of the training offerings.

The existing system requires individuals interested in ASHRAE training to navigate multiple webpages, each dedicated to a specific training type. Furthermore, these trainings must be purchased separately based on their respective learning categories. This fragmented approach presents several challenges:

1. Inefficiency: Members and the public must spend unnecessary time navigating different pages to find the training they need.
2. Complexity: The current structure can be confusing, leading to missed opportunities for skill development for users and missed purchases for ASHRAE.

3. Frustration: Potential learners may be discouraged by the complexity of the process, resulting in lost opportunities for both ASHRAE and individuals seeking professional development. Feedback from the CRCs roundtable is that guidance is needed in how to navigate through ASHRAE's technical resources and educational offerings.

To address these issues and provide a more user-centric learning experience, the Training and Education Committee (TEC) proposes the creation of a unified ASHRAE learning platform. The platform would consolidate ASHRAE eLearning, instructor-led training, and self-directed learning into a single, user-friendly web-based platform. The new platform will replace the existing website pages members currently use to find and purchase the various types of training.

Key features and benefits of the proposed ASHRAE learning platform:

1. Centralized Access: Users can access all types of ASHRAE training from a single location, streamlining the process of finding relevant courses.
2. Seamless Registration and Purchase: Individuals can conveniently register for and purchase different types of training from a single source/provider, reducing administrative burdens and simplifying payments.
3. Personalized Learning Paths: The platform will allow users to create personalized learning paths, tracking their progress and recommending additional courses based on their interests and needs. ASHRAE can also provide learning paths for each of the ASHRAE Certifications, potentially increasing the use of learning courses and the applications for certifications.
4. Enhanced Search and Filter Functions: Robust search and filter options will make it easier for users to find the precise training they want. This includes being able to filter and search for learning materials that correspond to an ASHRAE Certification.
5. Feedback and Assessment: Interactive features will enable users to provide feedback and evaluate the quality of courses, contributing to ongoing improvement.
6. Community and Collaboration: The platform will also foster a sense of community and facilitate collaboration among ASHRAE members and learners.

The new single platform for training will allow ASHRAE to promote several types of training in a single location and encourage members and nonmembers to obtain the content in a format that matters to them. Increased use/purchase of courses and training may also encourage new courses and instructors, increasing the already rich ASHRAE training portfolio.

TEC believes that the creation of this unified ASHRAE learning platform aligns with ASHRAE's mission to advance the arts and sciences of heating, ventilation, air conditioning, and refrigeration. Making ASHRAE educational resources more accessible and user-friendly will empower industry professionals and enthusiasts to effectively achieve their learning goals.

TEC kindly requests your approval and support to make this vision a reality, benefiting ASHRAE members and the broader HVAC&R community.

Thank you for considering this proposal. We look forward to discussing this initiative further and working together to improve ASHRAE's training offerings.

Fiscal Impact: The cost to implement the project is a one-time cost of \$109,000 to build out the new unified learning website. There is projected annual increase of \$40,000 for the hosting platform starting in year two. By streamlining and consolidating the hosting and check out process there is an expected

increase in revenue and sales. Implementation would also result in a reduction in demands on ASHRAE staff.

Expected Benefits

- An increase is expected in revenue from a streamlined offering that simplifies the navigation of offerings and the checkout process. Any specific numbers are conjecture but we do believe that the increased revenue will more than offset the increased cost.
- Currently collection of data on sales and users is difficult to correlate and use. A unified platform would allow for better data collection and more targeted marketing to drive additional sales.
- A considerable amount of staff time will be saved through automation on the new platform. The estimated savings are \$20,000 annually in staff time after implementation and an additional 500 hours per year available for staff to spend on other priorities and projects that are currently not getting the attention they deserve.

(Professional Development Subcommittee approved unanimously, 9-0-0, CV; Fiscal Subcommittee approved unanimously, 9-0-0, CV)

Information Items

1. The subcommittee referred two motions concerning the Handbook Online member benefit, one from Handbook Committee and one from Products Subcommittee, to the Member Model Ad Hoc for consideration in light of related motions from CRCs.
2. The following are selected information items from each committee/subcommittee.

Certification Committee:

1. Record Certification Applications [MBO 2]

ASHRAE will receive a record 700+ applications in 2023-24, which is a 45% increase over the 2022-23 near record total of 482 applications.

2. New Decarbonization Professional Certification [MBO 15]

Having received over 100 applications since March 1, the Certified Decarbonization Professional ([CDP](#)) certification is on track to administer the first CDP certification exams beginning June 25, 2024.

3. Record Certification Exam Study Guide Uptake [MBOs 3, 4 and 5]

Through May 31, 2024, over 1,100 study guides have either been sold or selected as a renewing full Member benefit.

[Certification Study Guide: Certified HVAC Designer \(CHD\)](#)

[Certification Study Guide: Building Commissioning Professional \(BCxP\)](#)

[Certification Study Guide: Building Energy Modeling Professional \(BEMP\)](#)

4. ANSI Annual Surveillance [MBO 4.1]

Following ANSI National Accreditation Board (ANAB) assessor team evaluation of ASHRAE's "Year 4 Annual Surveillance" application, ASHRAE Certification programs were granted an additional year of continued accreditation under the ISO/IEC 17024:2012 accreditation standard.

5. 2024-27 Exam Subcommittee Members [MBO 4.3]

Approved slate of nominees and alternates for seven Exam Subcommittees for the 2024-27 term. The slate was developed from a pool of 86 self-nominations.

Training and Education Committee:

1. Ten ALI courses are scheduled with the 2024 ASHRAE Annual Conference. The combined registration total to date is 111, compared to 111 in 2023 (Tampa) and 76 in 2022 (Toronto). Combined course revenue in Indianapolis is about \$25k compared to about \$16k in Tampa.
2. eLearning revenue through May 2024 has already surpassed the 2022-2023 fiscal year performance.
3. 1,776 individuals chose the eLearning membership benefit in July 2023- June 2024 compared to 2,334 in July 2022-June 2023.
4. The TEC completed the first year of the course reaffirmation process with approximately 20% of the existing ALI courses being reviewed and either reaffirmed, updated, or sunset if outdated and no longer implemented. The course catalog will continue to cycle through the reaffirmation process to ensure the ASHRAE education content is up to date and of a consistently high quality.
5. The TEC has selected Healthy Buildings as the next learning pathway and development of the pathway has shifted to ASHRAE staff.
6. New courses are being developed for building decarbonization in conjunction with CEBD. A new course on refrigerants will be developed at the request of the ASHRAE Board. Additional new content is being evaluated for development with a number of TCs.

Handbook Committee:

1. Added section 6.8 to Handbook Authors and Revisors Guide:

6.8 Use of Artificial Intelligence

ASHRAE's current position is not to use generative Artificial Intelligence (AI) when editing, revising, creating or modifying the ASHRAE Handbook volume chapters. Recommend PEC request TAC to notify Handbook committee when TCs merge or become inactive and to notify Handbook what Handbook chapters the affected TCs are responsible and the status of the continuation of the chapters, e.g. obsolete, transfer to another TC.

Historical Committee:

1. Historical Committee reviewed the purpose and scope of the Historical Committee, as well as the PEC organization and reporting structure.
2. Historical Committee has some members that have indicated they could volunteer go to Atlanta Headquarters to review the library archives for material for possible inclusion in the Engineering and Technology History Wiki (ETHW) as well as to start to look at, sort and organize some items for an initial review of what is in storage.
3. Historical Committee Chair reminded committee members that Wednesday, June 26, 2024 is ASHRAE and UNEP will recognize World Refrigeration Day 2024 (WRD 2024). The theme this year is "Temperature Matters". <http://ashrae.org/unep-wrd>

Publications Committee:

MBO #	Description	Metric (how do we determine success?)	Initiative # (can be more than 1)	Goal # (can be more than 1)	Completion Date	Financial Assist Req'd?	Comment
1	Review functions of the Publications Committee including reviewing the Rules of the Board (ROB) and updating the Manual of Procedures (MOP) and Manual. This includes creating subcommittees of the Publications Committee to assess market driven publications, and quarterly review of sales data.	Presenting a motion to update the ROB that incorporates the results of the MBO.	3 & 4	1a, 1b, 3a, 3b	6/30/2024	No	Review sales data during Winter and Annual conferences. Data points includes number of units sold, the number of publications published, the number of specific types of publications published, and lastly the dollar amount of the publications sold.
2	Review current market trends and create an action plan for transitioning from print to digital publication in alignment with the market. The scope includes all publications, except Standards and Handbook.	Completion of a report on trends with an action plan.	3 & 4	1b, 3a, 3b	6/30/2024	No	Most publications are available in digital format (typically PDF). However, there are few recommendations - 1) "Be Green" campaign to promote digital purchases, 2) emphasis on making digital products more interactive (video, hyperlinks, interactive charts), 3) making ASHRAE products 'search engine' more powerful.
3	Review current market trends and create an action plan for the digitization of ASHRAE Journal in alignment with the market. This MBO includes factoring in advertising revenue.	Completion of a report on trends with an action plan.	3 & 4	1b, 3a, 3b	6/30/2024	No	The recommendation is to continue Print publication and nextbook (web-based) and ADD mobile friendly content delivery. Based on readership survey, more than 70% members prefer Print edition. Also, advertisers prefer print over digital only.
4	Identify international markets for ASHRAE publications (not just for translations). Identify international experts who can modify and adapt current publications to local codes and market requirements.	Completion of a report that identifies markets. Completion of a list of international experts.	3 & 4	2b, 2c	6/30/2024	No	Implementation of ASHRAE products to a university course; promoting the standards and regulations to the international market; Local chapter needs for example, Montreal chapter wants French translation of certain standards, Hong Kong wants ASHRAE to publish in specific areas such as 'how to become Net Zero'; publications targeting healthcare sector in other countries.

Research Journal Subcommittee:

- Highlights from the Editor's report:
 - The rejection rate (68%) is about three times what we accept (26%).
 - The goal is to move Scholar One from being hosted by ASHRAE to Taylor & Francis. There was some discussion during the meeting concerning the logistics of making the transfer. This will assist in the move towards Format Free submission.
 - There have been more discussions related to posting on social media about articles. The Editor is thinking about adding a Social Media Manager. There was a suggestion that if someone was identified, they could coordinate with the ASHRAE marketing department to assist in STBE social media marketing.
- Highlights from the Publisher's Report (Taylor and Francis):
 - Top 10 downloads have increased.
 - Annual downloads are down slightly (-2%) and are holding steady.
 - The backlog has doubled in the last six months.
 - Cite Score number is now 4.3 vs. LY 3.7, an increase of 16%.
 - The data for the Impact Factor is not out yet, but there are several positive signs (like the Cite Score) that it should go up.

Respectfully submitted,

Billy Austin
June 25, 2024



Planning Subcommittee Report to PEC Meeting of June 25, 2024

Attendance: Chandra Sekhar – Chair, Adeeba S W Mehboob, Kimberly Pierson, Megan Tosh, Mark Tome, Art Giesler, Suz Ann M Arroyo (absent), Joseph L Furman (absent), Norman Grusnick (absent)

Motions for PEC Approval

Products Subcommittee sent the following two motions to both the Planning and Fiscal Subcommittees for their consideration and approval. After some discussion, Planning Subcommittee deferred a vote and suggests the motion be combined and/or reworded after Fiscal Subcommittee's review of the fiscal impact.

1. Keep Handbook Online a member benefit option. Do not convert it to a universal member benefit. Keep the status quo.

Background: HBC notes that a proposal from grassroots meetings, reported to PEC, indicates a preference to convert Handbook Online from a member benefit option to a universal member benefit. HBC believes that, given the global trend toward monetized subscriptions of electronic products, de-values the Handbook Online product. Hiding the cost within Society membership fees is a step that cannot ever be reversed.

HBC brought this motion to the PEC Products Subcommittee for their consideration, vote, and recommendation to the PEC Planning Subcommittee. Products Subcommittee Approved the motion 3-2-0 CNV.

2. Recommend that Handbook Online is identified as the default Member Benefit option so that members will receive a Handbook Online subscription if no Member Benefit option is selected upon membership renewal.

Background: Handbook Online provides the most current and complete product for all Handbook volumes. As industry transitions to electronic and web versions of publications, this default option will increase usage of Handbook Online. Staff Impact should be minimal.
(Products Subcommittee Approved 4-2-0 CV)

Fiscal Impact: Positive revenue

Products Subcommittee sent two other motions, as shown below, which are brought forward to PEC

3. Recommend that a direct communication channel be established between TAC and Handbook and Publications Committees to coordinate content development activities.

Background: TC mergers that are not announced or published on the Technical Committee web page can lead to confusion and missed communications from HBC. The effort to resolve the communication failure is heavy and frustrating. Direct communication between Handbook Committee, under Publication and Education Council, and TAC, under Technology Council, should be established to eliminate the silo approach and resolve issues more quickly. Implementation should be immediate. *(Products Subcommittee Approved 6-0-0 CV) (Planning Subcommittee Approved 5-0-0 CNV)*

Fiscal and Staff Impact: None

4. Approve changes to the Publications committee's ROB as shown in **Attachment A**.

Background: Publications Committee brought this motion to the PEC Products Subcommittee for their consideration, vote, and recommendation to the PEC Planning Subcommittee. These changes reflect the Special Publications responsibility more accurately and will require the approval of PEC and the BOD. *(Products Subcommittee Approved 5-0-0 CNV) (Planning Subcommittee Approved 5-0-0 CNV)*

Fiscal Impact: None

Information Items

Mr. Giesler reminded committee chairs simplify their committee MOPs and ROB by removing anything that should be included in their Reference Manuals to avoid requiring approvals from other governing bodies when not required. An action item was assigned to PEC Standing Committees to review their MOPs and ROB to remove everything that can be included in the Reference Manuals **(ACTION ITEM 1)**

*(Secretary's Note: Staff sent an email to PEC Standing Committees chairs, incoming chairs, incoming vice chairs, and staff liaisons explaining this action item shown **Attachment B**)*

Planning Subcommittee reviewed the PEC Committee and Reporting Structures shown in **Attachment C**. An action item was assigned staff to include the ASHRAE Training Center to the PEC Committee Structure. **(ACTION ITEM 2)** Complete. (Shown in **Attachment D**)

Products Subcommittee including the following reports:

- Handbook Committee shown in **Attachment E**.
- Historical Committee shown in **Attachment F**.
- Publications Committee shown in **Attachment G**.
- Research Journal Subcommittee shown in **Attachment H**.
- ASHRAE Roundtables Summary Report shown in **Attachment I**.

Professional Development Subcommittee including following reports:

- Certification Committee shown in shown in **Attachment J**.
- Training and Education Committee shown in **Attachment K**.

Respectfully submitted,

Chandra Sekhar, Chair Planning Subcommittee

June 24, 2024

CS/jh



Shaping Tomorrow's
Built Environment Today

Publications Committee Report to
the Products Subcommittee of the Publishing and Education Council
Monday, June 24, 2024, 8:00-9:30 a.m.

Action Item

1. Publications Committee recommends that PEC Products Subcommittee approve changes to the committee's ROB as shown in **Attachment A**. These changes reflect the need to include mention of the annual Journal Paper Award and to include another missing member task (communicating with the TC leadership), as well as a minor editorial change to the listing of Special Publications.

Information Items

1. Updates on the Publications Committee MBOs for the 2023-2024 Society year are included in **Attachment B**.
2. The Publications Committee MBOs for the 2024-2025 Society year are included in **Attachment C**.

Respectfully submitted,
Vinay Ananthachar, Chair
Publications Committee
24 June 2024

Attachment A

2.419 PUBLICATIONS COMMITTEE

2.419.001 SCOPE AND PURPOSE

This committee identifies the technical information needs of the HVAC&R industry not met through the ASHRAE Handbook series, ASHRAE's research journal, standards, guidelines, or user's manuals and oversees editorial policies and delivery of products to the marketplace. This committee also determines the best paper published in the volume year of *ASHRAE Journal* preceding the ASHRAE Winter Conference.

2.419.002 MEMBERSHIP

2.419.002.1 Composition

The members of this committee are as follows:

- A. Twelve (12) voting members, including a chair and a vice chair. (16-06-29-20)
- B. Non-voting members include a Board ex officio member and coordinating officer.

2.419.002.2 Qualifications

- A. All members of the committee shall hold the grade of Associate Member or higher in the Society.
- B. Members should have an awareness of the current technical information needs of various segments of the HVAC&R industry.
- C. Membership should include broad representation from the HVAC&R industry including the academic, design, construction, facility operations and manufacturing communities.
- D. At least three members should have recent experience with the production or writing of technical publications or periodicals.

2.419.002.3 Term of Service

The term of service for voting members is intended to be three (3) years.

2.419.003 OPERATION

2.419.003.1 General Requirements

- A. This committee shall oversee the editorial policies of ASHRAE's Special Publications, *ASHRAE Transactions* and other conference proceedings, *ASHRAE Journal*, and ASHRAE's electronic newsletters. The committee shall be subject to these conditions:

1. The data recommended for publication shall tend toward the professional education of the individual engineer;
2. Such data shall be free from commercial bias;
3. Such data shall tend to advance for the public benefit the arts and sciences relating to heating, refrigeration, air conditioning, and ventilation and the allied arts and sciences.

(67-06-25-08/82-06-30-25/86-06-22-18M)

- B. ASHRAE shall produce Special Publications that shall be defined as all technical publications in print format (except for the ASHRAE Handbook series; standards, guidelines, and user's manuals; ASHRAE's research journal, and ASHRAE's magazines), such as ~~non-series~~ books (including books resulting from ASHRAE Research Projects and Special Projects), ~~books in the Advanced Energy Design Guide series and the ASHRAE Datacom Series~~, charts, and tools, as well as all technical publications in machine-readable format, such as audio and visual presentations, software, databases, apps, and online resources. These special publications may be generated from proposals submitted directly to Publications Committee or from accepted Publication Topic Acceptance Requests (PTARs), which Publications Committee reviews before providing recommendations to Research Administration Committee (RAC) for the final vote regarding funding. [This committee shall also communicate with the cognizant TCs of existing ASHRAE publications to help staff determine whether older publications are up to date as is, need to be revised, or need to be removed from sale.](#)
- C. The objective of *ASHRAE Transactions* shall be to serve as the archival publication of unsolicited research papers and Society-sponsored research and discussions in HVAC&R technical areas presented at the ASHRAE Annual and Winter Conferences as well as of Society business such as council and committee membership and award recognition. The objective of proceedings of ASHRAE-sponsored conferences and ASHRAE cosponsored conferences shall be to serve as the archival publications of the unsolicited research papers presented at these conferences.
- D. The objective of *ASHRAE Journal* shall be to lead in communication of heating, ventilating, air-conditioning and refrigeration information to and from the profession, industry, and related interests. (ROB 520-144-007). Editorial and advertising content of *ASHRAE Journal* shall be directed toward the professional education of persons engaged in industries related to heating, ventilating, air conditioning, and refrigeration. (86-06-22-18L). [This committee shall determine the annual winner of the Journal Paper Award.](#)
- E. The objective of ASHRAE's electronic newsletters shall be to communicate news to various audiences. *Insights*, distributed to members only, includes news of members, chapters, regions, Society committees, and International Associates. (ROB 520-144-007; 86-06-22-18L) *ASHRAE Journal Newsletter*, distributed to members only, connects news of industry trends with articles from *ASHRAE Journal's* archive of peer-reviewed content. *ASHRAE HVAC&R Industry News* curates the latest trends and announcements from the industry to a large readership of members and non-members. *HPB Newsletter* combines online HPB articles and *ASHRAE Journal* articles with links to external articles related to energy efficiency, resiliency and sustainability for a diverse audience of ASHRAE engineers, architects, facilities managers and building owners.

2.419.004 STRATEGIC PLAN

(09-06-21-12C)

This committee shall develop procedures for recommending updates to the strategic plan on a continuous basis. As a minimum the committee shall submit a report to the council prior to the Annual Meeting. The report includes the current status of each activity which supports the fulfillment of the committee's assignments under the strategic plan. The committee shall report to the council all recommendations for changes to the strategic plan as provided by the committee's constituents prior to the Annual Meeting.

From: [Harr, Julie](#)
To: lyy9@cdc.gov; joe.furman@carrier.com; tpollard@execulink.com; normang@shaw.ca; vinay@greenbanyanconsulting.com; megan.tosh@gmail.com; nick.h.armstrong@imegcorp.com; sarroyo@cmapr.com; jessefisher@gmail.com; s_mages@yahoo.com; Roger.Ashby@wakegov.com; Kimberly.Pierson@baedri@yahoo.com; baedri@yahoo.com; olu@aosconsulting.co.za; kurt.monteiro@smithandandersen.com; Murray.Karen@Kline.Tim; Michaels.Cindy; Kennedy.Heather
Cc: bdgscs@nus.edu.sg; [Ken Fulk](#); [Owen, Mark](#)
Subject: Planning Subcommittee Action Item assignment to PEC Standing Committees
Date: Monday, June 24, 2024 10:01:00 PM

Dear PEC Standing Committee Chairs, Incoming Chairs, Incoming Vice Chairs, and Staff Liaisons:

During the PEC Planning Subcommittee meeting today, Chair Chandra Sekhar assigned an action item to PEC Standing Committees to review the Committee MOPs and ROB's and remove anything that should be included in your committees' Reference Manuals to avoid requiring approvals from other governing bodies when not required.

Just a reminder, any changes to MOPs or ROB's need to be reported for approval to the subcommittees listed below:

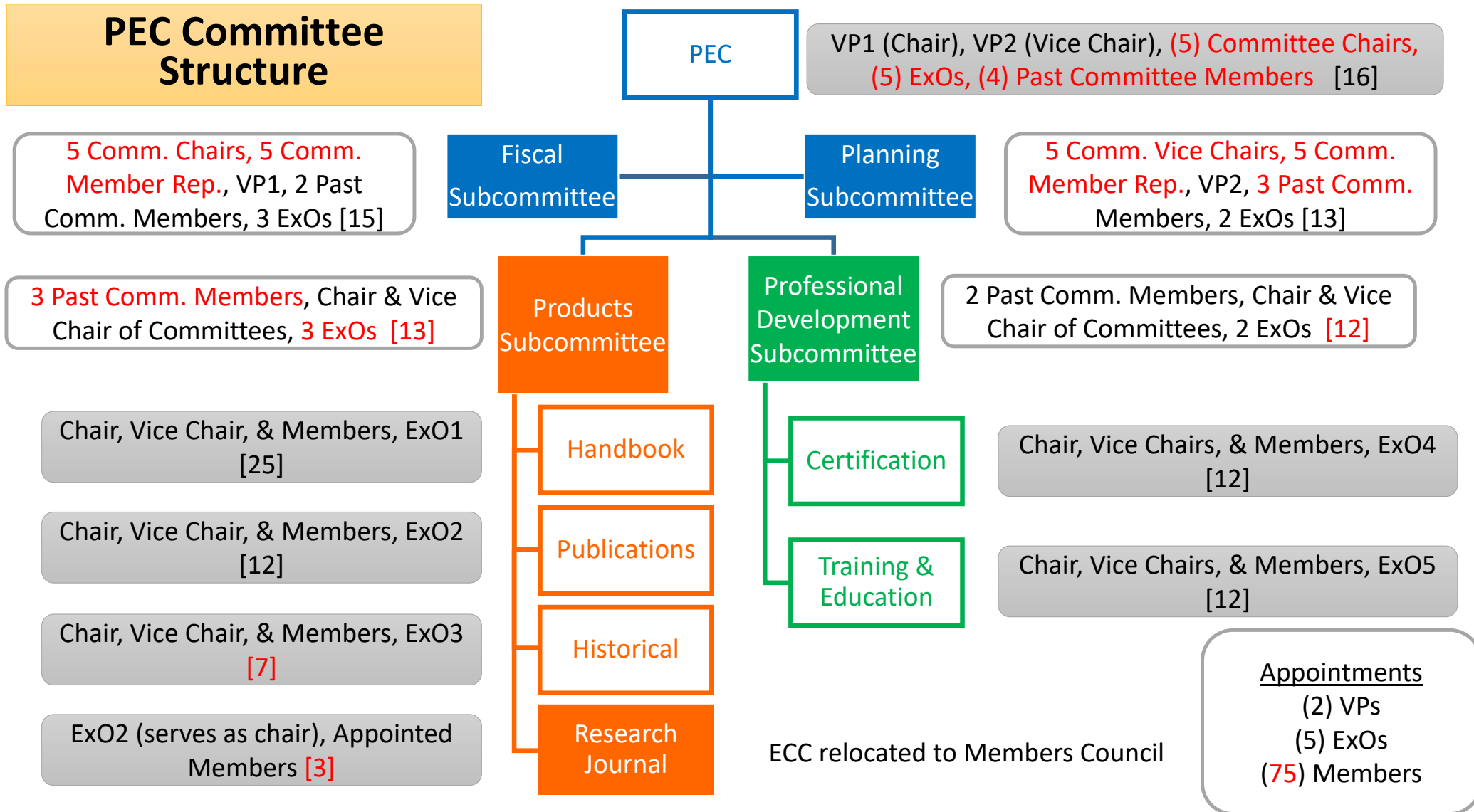
- Handbook Committee
- Historical Committee
- Publications Committee

(reports to Products Subcommittee, who will take it to Planning Subcommittee, who will take it to PEC)

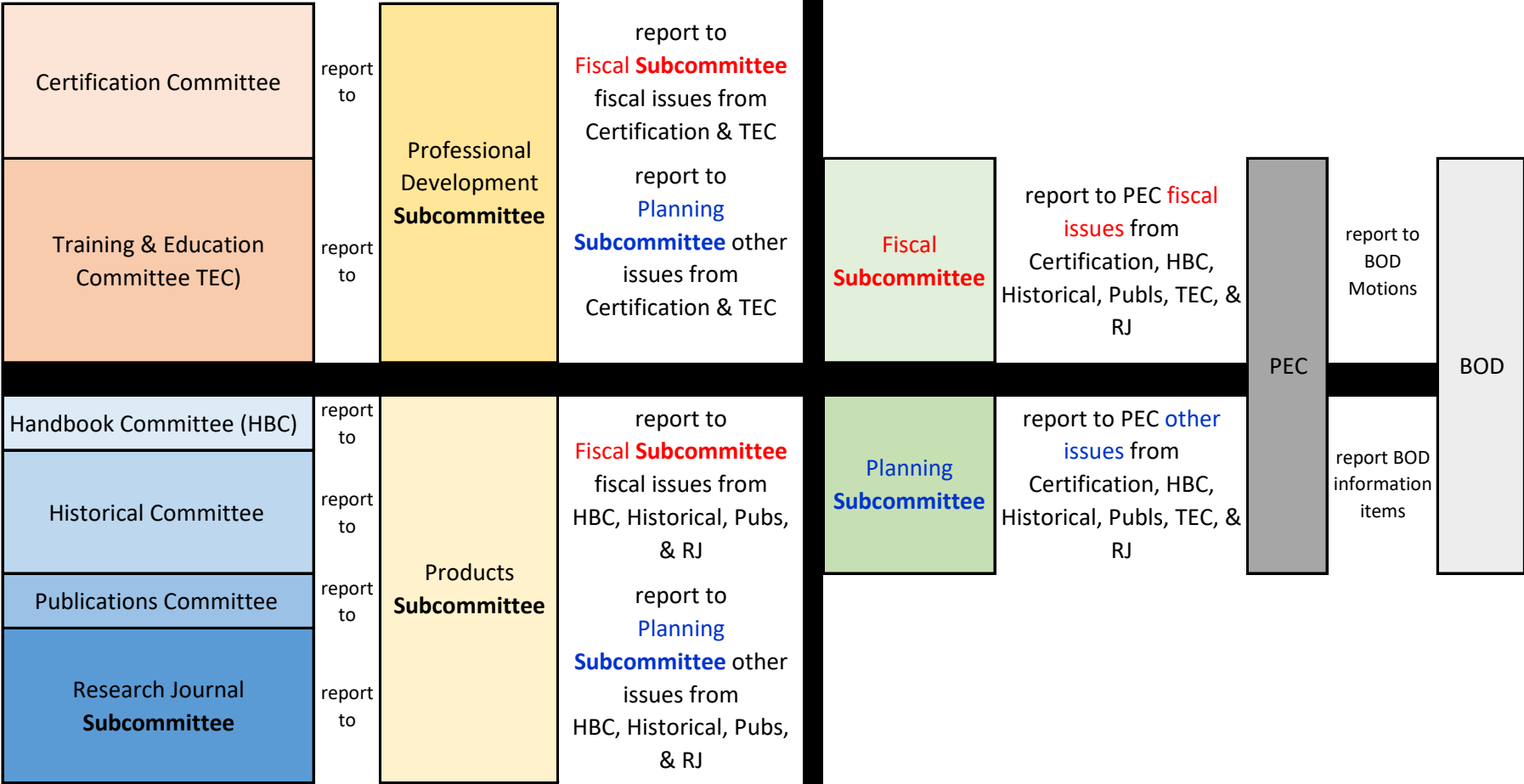
- Certification Committee
- Training and Education (TEC)

(reports to Professional Development Subcommittee, who will take it to Planning Subcommittee, who will take it to PEC)

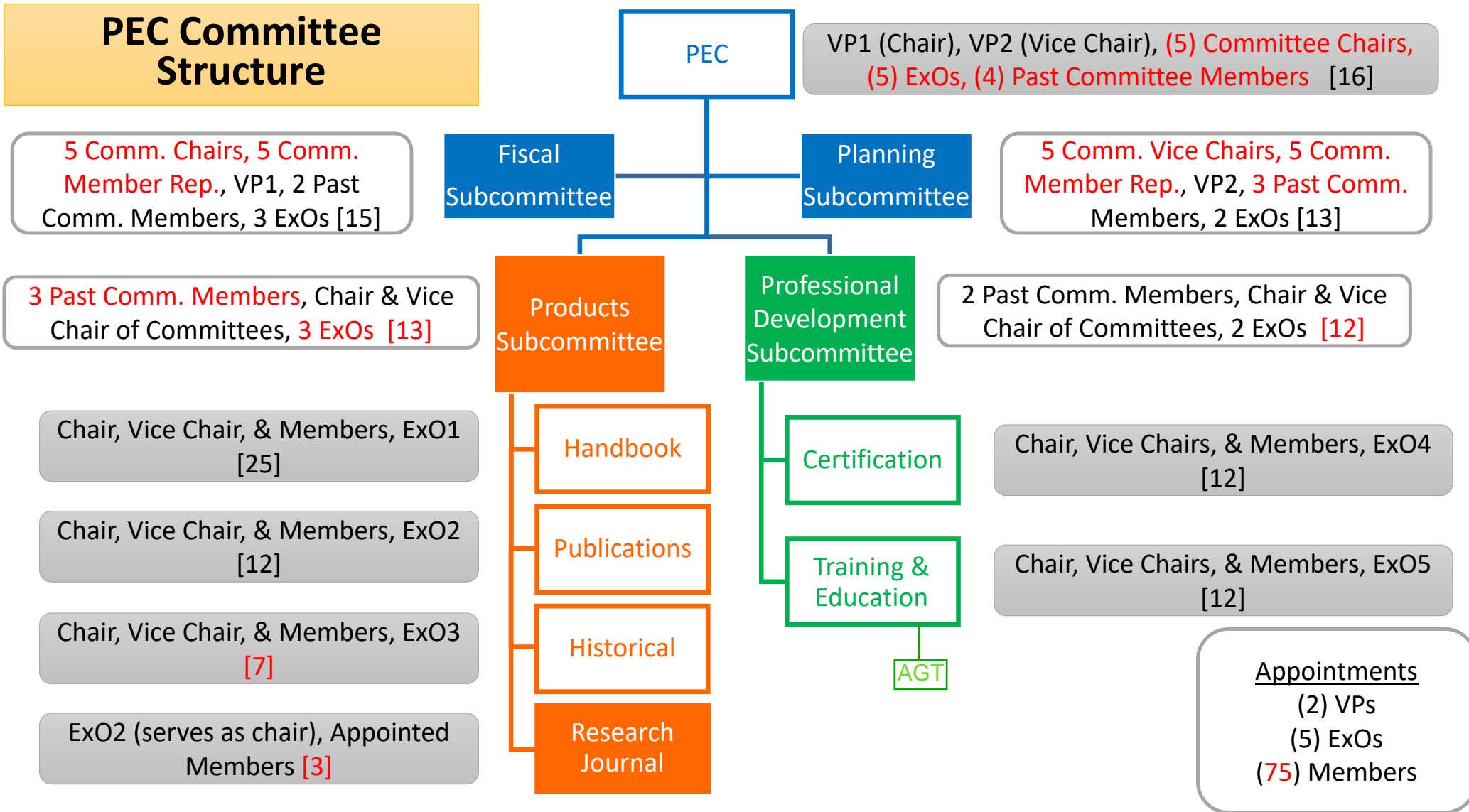
PEC Committee Structure



Reporting Structure



PEC Committee Structure



2024 Society Handbook Committee Report to Publication and Education Council
Annual meeting 23 June 2024
Indianapolis, Indiana

To: Publications and Education Council, and PEC Products Subcommittee

Motions to PEC:

Motion 1:

Recommend PEC request TAC to push a notification to Handbook committee when TCs merge or become inactive and to notify Handbook what Handbook chapters the affected TCs are responsible and the status of the continuation of the chapters, e.g. obsolete, transfer to another TC.

Background: TC mergers that are not announced or published on the Technical Committee web page can lead to confusion and missed communications from HBC. The effort to resolve the communication failure is heavy and frustrating.

Fiscal impact None

Implementation Immediate

Motion 2:

Keep Handbook Online a member benefit option. Do not convert it to a universal member benefit. Keep the status quo.

Background: HBC notes that a proposal from grassroots meetings, reported to PEC, indicates a preference to convert Handbook Online from a member benefit option to a universal member benefit. HBC believes that, given the global trend toward monetized subscriptions of electronic products, de-values the Handbook Online product. Hiding the cost within Society membership fees is a step that cannot ever be reversed.

Fiscal impact None

Implementation Immediate

Motions within HBC:

Motion:

Add section 6.8 to Handbook Authors and Revisors Guide:

6.8 Use of Artificial Intelligence

ASHRAE's current position is not to use generative Artificial Intelligence (AI) when editing, revising, creating or modifying the ASHRAE Handbook volume chapters. Recommend PEC request TAC to notify Handbook committee when TCs merge or become inactive and to notify Handbook what Handbook chapters the affected TCs are responsible and the status of the continuation of the chapters, e.g. obsolete, transfer to another TC.

Fiscal impact None

Implementation Immediate

Operations Report:

1. Volume reports

- a. Furman (2024 Systems and Eq.) has been printed, but not yet shipped (shipping issues, but is in bookstore right now) and will soon (July) be available as Handbook Online. Discussed lackluster response from TCs in their focus to maintain content that they are responsible for.
- b. Mages (2025 Fundamentals) reported partial success in getting content returned to staff.
- c. Thomle (2026 Refrigeration) reported problems in learning about TC mergers.
- d. Gowri (2027 Applications) reported assignment of liaisons to particular Chapters. Informed HBC of his Volume's new reporting scheme: data pulls from sharepoint ILO data queries and data pushes.

2. Subcommittees

- a. Excom (Sheinman) supervised, assigned task, consulted, and supported volume chairs and subcommittee chairs as needed. Worked with the vice chair (Furman) preparing for Society Year 2024-2025 and advancing the work of the HBC and improving communication with the TCs.
- b. Review/Training (Gowri) gave online training for TC Handbook subcommittee chairs and HBC liaisons. Ongoing incremental improvements are planned to respond to ongoing needs of member volunteers for Handbook training.
- c. Electronic (Mages) reviewed current electronic processes and has not comment for revisions at this time.
- d. Functional (Thomle) made two motions (described above). Developed working plan for coming 6 months: update and align MOP with the ASHRAE standard MOP template. Update the Reference Manual to include relevant/needed content removed from the MOP, and to add section describing incoming HBC liaison responsibilities. Present proposed revised MOP and reference manual the HBC at 2025 winter meeting. Vote on MOP will be to forward to PEC for endorsement/ratification and then to BOD for endorsement/ratification. Vote on reference manual to adopt changes within Committee. ASHRAE staff to include the revisions to the Chapter Approval Checklist, breaking query 1 to queries 1.a and 1.b, incorporating query asking if chapter changed.
- e. Strategic Planning (Furman) reported plans he has for HBC in this upcoming Society Year, discussing 2023-2024 MBOs which are being carried over, development of ideas related to reaching alternate learning styles of younger membership, developing guidance to TCs further widen geographical and breadth of Chapter content, and develop motion for PEC to reach out to TAC for some TC accountability.

3. General

- a. Quorum was achieved, and the Chair opened the meeting.
- b. 2024 Winter Meeting Minutes from Atlanta were unanimously approved as noted.

4. 2023-2024 MBOs and results are shown in attachment A. 2024-2025 MBOs will be issued in 7/2024.

Respectfully submitted,

Harris Sheinman
Handbook Chair
23 June, 2024

Attachment A
2023-2024 MBOs

MBO #	Description	Metric	Initiative #	Goal #	Completion % /Date
1	Consider Handbook volumes as a whole: balance out volume sizes.	Re-allocating Chapters so that all four volumes are of roughly equal size and workload.	3	1b	PEC ad-hoc made recommendation
2	Review number of Chapters that are the responsibility of one TC	No TC is overloaded with more chapters than its membership can maintain.	3	1b	ongoing
3	Encourage TCs to develop extra features (spreadsheets, sidebar discussions, video, etc.) for Handbook Online.	Increase in number of Handbook Online extra features.	3, 4	1b, 2c	ongoing
4	Review and improve ARG for clarity and conciseness (this includes the chapter submittal form).	Updates to be made.	3	1b	ongoing
5	Review and improve MOP for clarity and conciseness.	Updates to be made.	3	1b	ongoing
6	Author and develop how-to videos and other job aids for HBC liaisons, TC handbook subcommittee chairs, and other stakeholders.	Author and post videos	3	1b	ongoing
7	Review single topic/multi TC Chapters responsibility to one TC.		3	1b	ongoing
8	Develop calendar-based activity prompts job aid for HBC leadership to use in managing the HBC.	Author and issue internal guidance document	3	1b	ongoing
9	Work with staff to update Handbook Central.	Updates to be made.	3	1b	ongoing
10	Update Reference Manual and post on Basecamp.	Updates to be made.	3	1b	ongoing



Historical Committee Report to Products SC

Meeting of Sunday, June 23, 2024

JW Marriott – Indianapolis, IN

Historical Committee Roster 2023-2024		
Name	Position	Voting
Robert Thomas Pollard	Chair	yes
Norman Grusnick	Vice Chair	yes
Khalid Gulzar- absent	Member	yes
Andrew Pearson – (online)	Member	yes
Gregory Schnable	Member	yes
Akinbowale Soluade	Member	yes
Henry Frederick Stehmeyer - absent	Member	yes
Arthur Giesler	BOD Ex-Officio	no
Billy Austin - absent	Coordinating Officer	no
Julie Harr	Staff Liaison	no

Friends of the Historical Committee

Spencer Morasch, Niss Feiner, Bern Nagengast, Steve Comstock - absent, Andrea Phillips - absent, Michael Tatoyan - absent, Randy Schrecengos - absent, Jeff S. Haberl, Tom Watson – absent, Bruce Flaniken – absent, David Arnold – absent

Motions for Products Subcommittee Action

None.

Information Items

1. Historical Committee reviewed the purpose and scope of the Historical Committee, as well as the PEC organization and reporting structure.
2. Historical Committee voted to approve with corrections the committee’s meeting minutes from the January 2024 Chicago meeting. **Approved 4-0-0 CNV**
3. Mr. Giesler gave a Board of Directors Leadership Presentation to the Historical Committee.
4. Historical Committee reviewed the committee’s MBOs. (Attachment A)

5. Historical Committee's Communications/Regional Historian Guidelines Subcommittee reported communicating regularly with Regional Historians since the Winter January 2024 Chicago meeting.
6. Historical Committee's Administrative/Archives Subcommittee reminded the committee that requested funds at the January 2024 meeting in Chicago and PEC approved. Historical Committee has some members that have indicated they could volunteer go to Atlanta Headquarters to review the library archives for material for possible inclusion in the Engineering and Technology History Wiki (ETHW) as well as to start to look at, sort and organize some items for an initial review of what is in storage.
7. Historical Committee's Awards/Leadership Voices Subcommittee reported that the committee needs to choose individuals for Leadership Recalled interviews.
8. Historical Committee chair reminded committee members there was still a need to recruit future committee members.
9. Historical Committee discussed the Finance Committee's proposal to reorganize the Historical Committee and made plans to attend the BOD open session to express their concerns.
10. Historical Committee gave an action item to staff to create a new Basecamp project site to allow for posting of historical articles for regional and chapter historians.
11. Historical Committee Chair reminded committee members that Wednesday, June 26, 2024 is ASHRAE and UNEP will recognize World Refrigeration Day 2024 (WRD 2024). The theme this year is "Temperature Matters". <http://ashrae.org/unep-wrd>

MBO - Submission to Planning

last update: 2024-06-19

Council: Publications & Education

Committee: Historical

Chair: Tom Pollard

Vice-chair: Norman Grusnick

								Strategic Plan Tally											
MBO #	Description	Metric	Initiative #	Goal #	Completion % /Date	Financial Assist Req'd?	MBO Comments	Initiative #				Goal 1		Goal 2			Goal 3		
		(how do we determine success?)						1	2	3	4	a	b	a	b	c	a	b	c
1	Establish and maintain a continuous line of communication between Society Historical Committee and Regional+Chapter Historians	Electronic communication to be by Committee Chair on a quarterly basis, with input from committee members.	4	2a, 2c	100% complete for 2023-2024 and ongoing for future years	No	emails sent to ASHRAE Regional Historians				X			X		X			
2	Develop PAOE Recommended Changes for Next Year 2024-2025	To get ahead of the PAOE Committee Cycle with proposal for the following year's (Society Year 2023-2024), Historical PAOE subcommittee needs to work with the PAOE subcommittee of Members Council during the Fall to Submit recommendations.	4	2a	Ongoing due before Feb 1 of each year	No	review PAOE items and forward comments				x			X					
3	Encourage younger members of ASHRAE (specifically SA & YEA) to have interest in history related activities of the Society	reference PAOE H14=For each Membership Promotion, YEA, or Student Activities event planned with a representative from the chapter Historical Committee to add a historical context to the event	4	2a	Ongoing	No					X			X					
4	Identify volunteers to act as committee liaison to other Society Committees	Collaborating with other committees to support ASHRAE's mission by providing a historical context to educate and inspire members.	4	2a, 2c	Ongoing 1 of 3 positions filled	No	Historical Committee Liason: Greg Schnable = Membership Promotion Young Engineers in ASHRAE = TBD Student Activities = TBD				X			X		X			
5	Foster collaboration with other international societies to improve our historical research and support history related activities of the Society	1) Continue work to have ASHRAE membership in the IEEE History Center - Engineering & Technology History Wiki (ETHW) [web site: https://ethw.org]. 2) Grow support in the Life Members Club to fundraise & create an endowment fund that would provide ongoing financial support to sustain membership in the IEEE History Center. 3) Continue work on collaboration. HC has links with similar groups in CIBSE and AICARR - opportunity to pursue to work w/similar committees in CEN, Intl Institute of Ammonia Refrigeration (IIR), Intl Institute of Refrigeration (IIR), & Global Cold Chain Alliance (GCCA).	4	2b	ETHW agreement complete ongoing to add info to the wiki	YES yearly fee \$3000	Budget has been approved for IEEE Wiki by PEC contingent on due diligence. Awaiting signature on agreement - COMPLETED ETHW.org agreement signed, 2024 payment completed, ASHRAE logo added to web site Some ASHRAE historianl information to be added to ETHW.org (wiki) web site				X					X			

6	Digitize, Sort and Archive historical items including old archived Journals and Transactions	Proposed to have some storage items at HQ to be brought to Society meetings so can be reviewed by the HC - for importace, scanning, index, etc.	4	1b, 2c, 3c	ONGOING funds requested thru PEC to allow member review of some of the items at HQ	Yes requested \$6000 to start review	Some boxes of items reviewed in Chicago * funds required thru PEC to allow for members to review historial items at ASHREA HQ (to cover travel costs = \$6000 requested) * may require future funds to purchase other items such as storage racking or displays at HQ				x		x			X			X
7	Leadership Recall to be arrange at Winter and Summer Conference	Arrange two Presidential interviews. Review other potential interviewees	4	1b, 2c	Ongoing	Yes*	*had past access to videogropher to video interviews at conferences, however no longer at present time due to covid \$ cuts. In discussion with ASHRAE Journal Podcast to use resources for interviews Review if Podcast Team can provided then interviews				X		x			X			
								0	0	0	7	0	2	2	1	4	0	0	1
								Initiative #				Goal 1		Goal 2			Goal 3		
								1	2	3	4	a	b	a	b	c	a	b	c



Shaping Tomorrow's
Built Environment Today

Publications Committee Report to
the Products Subcommittee of the Publishing and Education Council
Monday, June 24, 2024, 8:00-9:30 a.m.

Action Item

1. Publications Committee recommends that PEC Products Subcommittee approve changes to the committee's ROB as shown in **Attachment A**. These changes reflect the need to include mention of the annual Journal Paper Award and to include another missing member task (communicating with the TC leadership), as well as a minor editorial change to the listing of Special Publications.

Information Items

1. Updates on the Publications Committee MBOs for the 2023-2024 Society year are included in **Attachment B**.
2. The Publications Committee MBOs for the 2024-2025 Society year are included in **Attachment C**.

Respectfully submitted,
Vinay Ananthachar, Chair
Publications Committee
24 June 2024

Attachment A

2.419 PUBLICATIONS COMMITTEE

2.419.001 SCOPE AND PURPOSE

This committee identifies the technical information needs of the HVAC&R industry not met through the ASHRAE Handbook series, ASHRAE's research journal, standards, guidelines, or user's manuals and oversees editorial policies and delivery of products to the marketplace. This committee also determines the best paper published in the volume year of *ASHRAE Journal* preceding the ASHRAE Winter Conference.

2.419.002 MEMBERSHIP

2.419.002.1 Composition

The members of this committee are as follows:

- A. Twelve (12) voting members, including a chair and a vice chair. (16-06-29-20)
- B. Non-voting members include a Board ex officio member and coordinating officer.

2.419.002.2 Qualifications

- A. All members of the committee shall hold the grade of Associate Member or higher in the Society.
- B. Members should have an awareness of the current technical information needs of various segments of the HVAC&R industry.
- C. Membership should include broad representation from the HVAC&R industry including the academic, design, construction, facility operations and manufacturing communities.
- D. At least three members should have recent experience with the production or writing of technical publications or periodicals.

2.419.002.3 Term of Service

The term of service for voting members is intended to be three (3) years.

2.419.003 OPERATION

2.419.003.1 General Requirements

- A. This committee shall oversee the editorial policies of ASHRAE's Special Publications, *ASHRAE Transactions* and other conference proceedings, *ASHRAE Journal*, and ASHRAE's electronic newsletters. The committee shall be subject to these conditions:

1. The data recommended for publication shall tend toward the professional education of the individual engineer;
2. Such data shall be free from commercial bias;
3. Such data shall tend to advance for the public benefit the arts and sciences relating to heating, refrigeration, air conditioning, and ventilation and the allied arts and sciences.

(67-06-25-08/82-06-30-25/86-06-22-18M)

- B. ASHRAE shall produce Special Publications that shall be defined as all technical publications in print format (except for the ASHRAE Handbook series; standards, guidelines, and user's manuals; ASHRAE's research journal, and ASHRAE's magazines), such as ~~non-series~~ books (including books resulting from ASHRAE Research Projects and Special Projects), ~~books in the Advanced Energy Design Guide series and the ASHRAE Datacom Series~~, charts, and tools, as well as all technical publications in machine-readable format, such as audio and visual presentations, software, databases, apps, and online resources. These special publications may be generated from proposals submitted directly to Publications Committee or from accepted Publication Topic Acceptance Requests (PTARs), which Publications Committee reviews before providing recommendations to Research Administration Committee (RAC) for the final vote regarding funding. This committee shall also communicate with the cognizant TCs of existing ASHRAE publications to help staff determine whether older publications are up to date as is, need to be revised, or need to be removed from sale.
- C. The objective of *ASHRAE Transactions* shall be to serve as the archival publication of unsolicited research papers and Society-sponsored research and discussions in HVAC&R technical areas presented at the ASHRAE Annual and Winter Conferences as well as of Society business such as council and committee membership and award recognition. The objective of proceedings of ASHRAE-sponsored conferences and ASHRAE cosponsored conferences shall be to serve as the archival publications of the unsolicited research papers presented at these conferences.
- D. The objective of *ASHRAE Journal* shall be to lead in communication of heating, ventilating, air-conditioning and refrigeration information to and from the profession, industry, and related interests. (ROB 520-144-007). Editorial and advertising content of *ASHRAE Journal* shall be directed toward the professional education of persons engaged in industries related to heating, ventilating, air conditioning, and refrigeration. (86-06-22-18L). This committee shall determine the annual winner of the Journal Paper Award.
- E. The objective of ASHRAE's electronic newsletters shall be to communicate news to various audiences. *Insights*, distributed to members only, includes news of members, chapters, regions, Society committees, and International Associates. (ROB 520-144-007; 86-06-22-18L) *ASHRAE Journal Newsletter*, distributed to members only, connects news of industry trends with articles from *ASHRAE Journal's* archive of peer-reviewed content. *ASHRAE HVAC&R Industry News* curates the latest trends and announcements from the industry to a large readership of members and non-members. *HPB Newsletter* combines online HPB articles and *ASHRAE Journal* articles with links to external articles related to energy efficiency, resiliency and sustainability for a diverse audience of ASHRAE engineers, architects, facilities managers and building owners.

2.419.004 STRATEGIC PLAN

(09-06-21-12C)

This committee shall develop procedures for recommending updates to the strategic plan on a continuous basis. As a minimum the committee shall submit a report to the council prior to the Annual Meeting. The report includes the current status of each activity which supports the fulfillment of the committee's assignments under the strategic plan. The committee shall report to the council all recommendations for changes to the strategic plan as provided by the committee's constituents prior to the Annual Meeting.

Attachment B

Publications Committee MBOs for Society Year 2023-2024

Chair: Vinay Ananthachar **Date:** 24 June 2024

MBO #	Description	Metric (how do we determine success?)	Initiative # (can be more than 1)	Goal # (can be more than 1)	Completion Date	Financial Assist Req'd?	Comment
1	Review functions of the Publications Committee including reviewing the Rules of the Board (ROB) and updating the Manual of Procedures (MOP) and Manual. This includes creating subcommittees of the Publications Committee to assess market driven publications, and quarterly review of sales data.	Presenting a motion to update the ROB that incorporates the results of the MBO.	3 & 4	1a, 1b, 3a, 3b	6/30/2024	No	Review sales data during Winter and Annual conferences. Data points includes number of units sold, the number of publications published, the number of specific types of publications published, and lastly the dollar amount of the publications sold.
2	Review current market trends and create an action plan for transitioning from print to digital publication in alignment with the market. The scope includes all publications, except Standards and Handbook.	Completion of a report on trends with an action plan.	3 & 4	1b, 3a, 3b	6/30/2024	No	Most publications are available in digital format (typically PDF). However, there are few recommendations - 1) "Be Green" campaign to promote digital purchases, 2) emphasis on making digital products more interactive (video, hyperlinks, interactive charts), 3) making ASHRAE products 'search engine' more powerful.
3	Review current market trends and create an action plan for the digitization of ASHRAE Journal in alignment with the market. This MBO includes factoring in advertising revenue.	Completion of a report on trends with an action plan.	3 & 4	1b, 3a, 3b	6/30/2024	No	The recommendation is to continue Print publication and nextbook (web-based) and ADD mobile friendly content delivery. Based on readership survey, more than 70% members prefer Print edition. Also, advertizers prefer print over digital only.
4	Identify international markets for ASHRAE publications (not just for translations). Identify international experts who can modify and adapt current publications to local codes and market requirements.	Completion of a report that identifies markets. Completion of a list of international experts.	3 & 4	2b, 2c	6/30/2024	No	Implementation of ASHRAE products to a university course; promoting the standards and regulations to the international market; Local chapter needs for example, Montreal chapter wants French translation of certain standards, Hong Kong wants ASHRAE to publish in specific areas such as 'how to become Net Zero'; publications targeting healthcare sector in other countries.

Attachment C

Publications Committee MBOs for Society Year 2024-2025

Chair: Megan Tosh **Date:** 24 June 2024

MBO #	Description	Metric	Initiative #	Goal #	Completion % /Date	Financial Assist Req'd?	MBO Comments
		(how do we determine success?)					
1	Create a process for the Publications Committee to compile information on market needs for publications and communicate that information to potential authors	Update the Reference Manual to describe the process for committee operations	3	1b, 2b, 3a	2025 Annual Meeting	N	Publications Committee receives input on market needs from other committees and organizations, as well as through its own internal evaluations.
2	Integrate ASHRAE publications with other ASHRAE product offerings.	Compile a report on product opportunities and identify market gaps	4	1a, 1b, 2c	2025 Annual Meeting	N	Liaise with Training & Education, Certifications, and others to ensure existing publications are fully leveraged and to identify new product opportunities
3	Develop a streamlined communication process with technical committees that support publication	50% response rate from TC chairs by 2025 Annual Conference	3	3b	2025 Winter Meeting	N	Publications Committee to set up a working group meeting with members of TAC to develop a method of communication with TC chairs so publications that have been developed by TCs are adequately maintained and managed.



**Research Journal Subcommittee of PEC
Report to PEC Products Subcommittee
Meeting of Thursday June 13, 2024**

Attendance: Blake Ellis, Tim Dwyer - [absent](#), Carey Simonson, Jeffrey Spitler, Mark Owen, Stephanie Loeh, Mary Bolton

PEC - Research Journal Subcommittee			
Name	SC position	Voting	Note
Blake Ellis	Chair	Yes	Publications Committee ExO
Tim Dwyer	Member	Yes	ASHRAE Fellow
Carey Simonson	Member	Yes	ASHRAE Fellow
Jeffrey Spitler	Member	no	STBE Editor
Mark Owen	Staff Liaison	no	Director of Publications and Education
Stephanie Loeh	n/a	n/a	Taylor & Francis, Publisher
Mary Bolton	n/a	n/a	Staff - Associate Editor, Special Publications

Motions

None.

Information Items

1. Mr. Owen reviewed the financial statements with committee members. All 2023-24 costs have likely already been realized, and the costs to date would be similar to the final costs.
2. Dr. Spitler presented the Editor's Report ([Attachment A](#)).

Highlights from the report:

- Submissions are down a little, but not a concern.
- The rejection rate (68%) is about three times what we accept (26%).
- One Associate Editor spot is open, but the Editor is not looking to fill the spot now.
- One Associate Editor has a term expiring; however, they may still renew.
- The goal is to move Scholar One from being hosted by ASHRAE to Taylor & Francis. There was some discussion during the meeting concerning the logistics of making the transfer. This will assist in the move towards Format Free submission.
- The backlog of articles has increased since the last report.
- The Editor feels that things are going well.
- There have been more discussions related to posting on social media about articles. The Editor is thinking about adding a Social Media Manager. There was a suggestion that if someone was identified, they could coordinate with the ASHRAE marketing department to assist in STBE social media marketing.

3. Stephanie Loeh presented the Taylor & Francis Publishers Report. (Attachment B)

Items Included in the attached report:

- Most downloaded articles in the past 12 months
- Institutions that downloaded the most articles in the past 12 months
- Most downloaded articles by country
- Number of articles by year
- Average speed of article publication past 12 months
- Average speed of article publication past 6 years
- Articles with highest Impact Factor in the past 6 years
- STBE Impact Factor over the past 6 years
- STBE CiteScore for the last 6 years
- The top cited articles published online in the past two years were
- Citing Scores by journal source and region or country
- Top 10 Altmetric Scores for STBE articles
- An Author Survey with overall satisfaction and peer review process scores
- Some Taylor & Francis marketing efforts

Highlights from the report:

- Top 10 downloads have increased.
- Annual downloads are down slightly (-2%) and are holding steady.
- The backlog has doubled in the last six months.
- Cite Score number is now 4.3 vs. 3.7, an increase of 16%.
- The data for the Impact Factor is not out yet, but there are several positive signs (like the Cite Score) that it should go up.
- Altmetric is the score beyond academia, more focused on social media and news outlets.
- Everyone can visit the Research Journal website and sign up for new content alerts.

Respectfully submitted,

Blake Ellis, Chair
June 13, 2024
BE: jh/mso

Science and Technology for the Built Environment

Jeffrey D. Spitler

June 13, 2024

Numbers in red from last year

Journal metrics



Usage

- **110K** annual downloads/views *2.094* • **1.9 (2022)** Impact Factor
- 105K* *2.121* • **1.9 (2022)** 5 year IF

3.5 • **3.7 (2022)** CiteScore (Scopus)

Q2 • **Q2** CiteScore Best Quartile

0.808 • **0.706 (2022)** SNIP

0.493 • **0.471 (2022)** SJR



Citation metrics

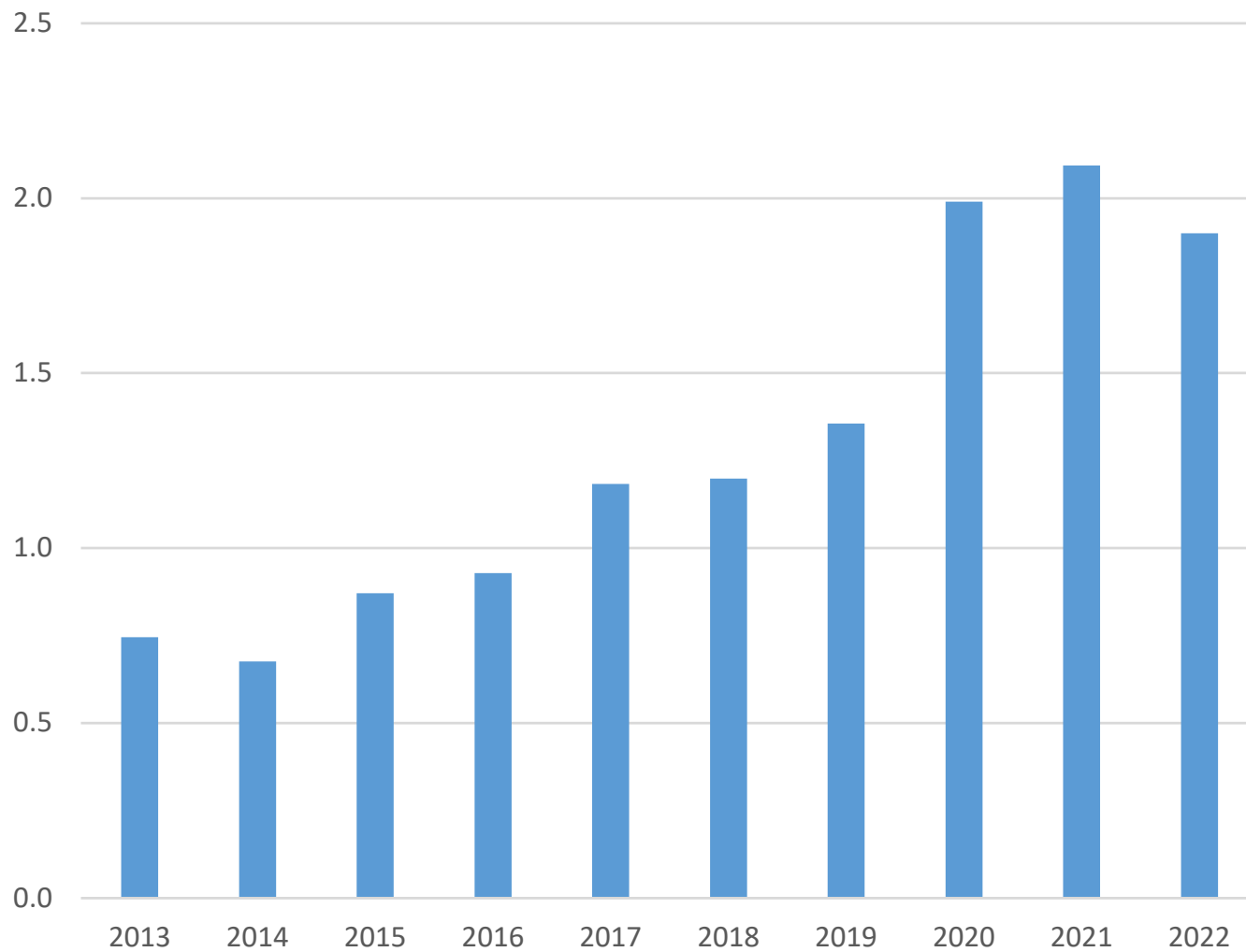


Speed/acceptance

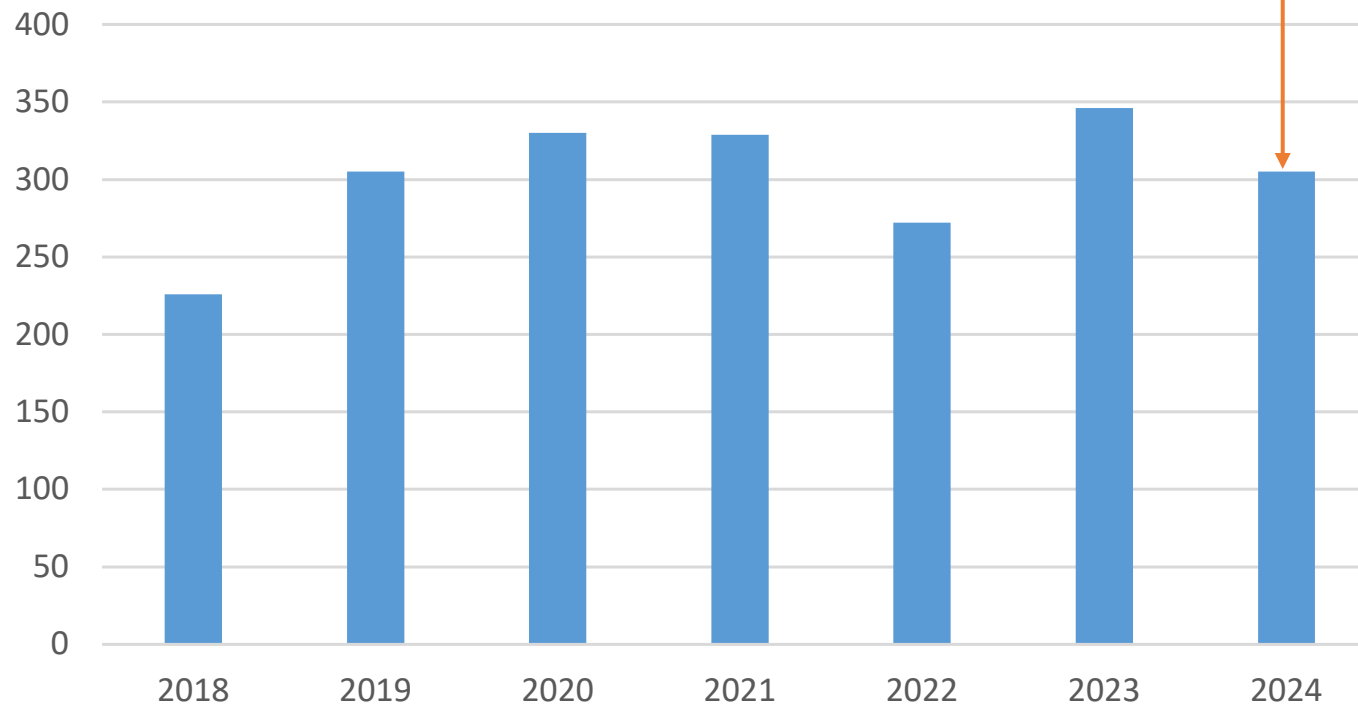
- **28** days avg. from acceptance to online publication

26 days

Impact Factor



Submissions



*2024 projected
based on 127
papers submitted
through June 1*

2023 (as of June 1, 2024)

- 272 submissions started; 31 withdrawn or abandoned; 315 net
- 18 papers still in review
- JDS rejected 118 papers without sending out to AE
 - Common reasons: case studies, out of scope, poor English, lack of technical rigor.
- 39 rejections by recommendation of AE, w/o sending out for review
- 56 rejections by recommendation of AE & reviewers
- 6 papers were abandoned after the 1st review
- 84 accepted
- Accepted: 26%; Rejected 68%; Still in review, 5%

Special Issues & Topical Sections

- 2023 Special Issues and Topical Sections:
 - Measured Performance (3 papers, Issue 2)
 - IAQ 2020: Indoor Environmental Quality Performance Approaches Transitioning from IAQ to IEQ [Part 2] (5 papers, Issue 7)
 - ASHRAE Conference Research Papers from 2022 (9 papers, Issue 9)
- 2024 Special Issues and Topical Sections
 - Ground-source Heat Pump Systems (5 papers, Issue 3)
 - BPAC/Simbuild 2022 (7 papers, Issue 4)
 - Buildings XV Conference(10 papers, 3 Issue 7)
 - ASHRAE Conference Research Papers from 2023 (7 submissions, 3 rejected)
 - Decarbonization conference in Athens (3 submissions, 2 rejected)
- Future Special Issues and Topical Sections
 - ASHRAE Conference Research Papers from 2024
 - Buildings XVI Conference
 - Clima 2025

Misconduct allegations

- None!

Associate Editors

- 4 Associate Editors rolled off
- Previously proposed three new AE slots.
- Current roster:

June 2023 approval	October 2023 approval
--------------------	-----------------------

Jie Cai	School of Aerospace and Mechanical Engineering	University of Oklahoma	USA
Kristen Cetin	Department of Civil and Environmental Engineering	Michigan State University	USA
Richard De Dear	Faculty of Architecture	The University of Sydney	Australia
Brian Fronk	Department of Mechanical Engineering	Pennsylvania State University	USA
Saqib Javed	Building Services Division	Lund University	Sweden
Yong Chan Kim	Department of Mechanical Engineering	Korea University	South Korea
Clayton Miller	Department of the Built Environment	National University of Singapore	Singapore
Liam O'Brien	Department of Civil and Environmental Engineering	Carleton University	Canada
Zheng O'Neill	Mike Walker '66 Department of Mechanical Eng.	Texas A&M University	USA
Rajan Rawal	Faculty of Technology	CEPT University	India
Jørn Toftum	Department of Civil Engineering	Technical University of Denmark	Denmark
Shengwei Wang	Department of Building Services Engineering	The Hong Kong Polytechnic University	Hong Kong
Bin Yang	School of Energy and Safety Engineering	Tianjin Chengjian University	China
John Zhai	Dept. of Civil, Environmental, and Architectural Eng.	University of Colorado-Boulder	USA
Jianshun "Jensen"	Department of Civil and Environmental Engineering	Syracuse University	USA
Claudio Zilio	Department of Management and Engineering	University of Padova	Italy

Associate Editors

- Richard DeDear (term expires; will renew if he agrees)
- One slot unfilled.

Reviewer Board

- Concept:
 - Recruit members from junior and mid-level faculty, recent PhD graduates.
 - Commitment to review ~4 papers per year in a timely fashion (2 weeks or less).
- Current status:
 - 45 members; 3 nominated for Associate Editor
 - Since Jan. 2022, on average:
 - 4.5 invitations
 - 3.4 acceptances
- Will ask AEs for additional nominations

Logistical Problems (LaTeX)

- LaTeX submissions remain problematic.
- I queried Stephanie on October 27th about format-free submission
- January 17th:
Unfortunately, the journal is not currently eligible for this format since it would be required to use 1- T&F's Journal Editorial Office support in ScholarOne and 2- the T&F standard reference style.
- Mark Owen sent Stephanie agreement on February 1 – no word yet.
- We have a partial work-around for LaTeX submissions.

Logistical problems (low backlog)

- Backlog was low but is significantly improved.
- January 2023: 5 papers in backlog.
- June 2023: 6 papers in backlog.
- December 2023, after filling 2024.01 lineup:
 - 20 papers total.
 - 9 of these are reserved for special issues.
- August 2024, after allocating 20 papers to 2024.06 and 2024.07:
 - 12 papers total.

General Plans

- Carry on:
 - Continue with moving towards format-free submission.
 - Continue to recruit special issues based on conferences.
 - Will ask the Editorial Board to help identify non-conference-based topical issues.
- Considering a “Social Media Editor”



Attachment B



SCIENCE AND TECHNOLOGY FOR THE BUILT ENVIRONMENT

Confidential Publishing Report

Last Updated: June 2024

Highlights

Top Performing Articles (last 12 months)

Top Downloaded Article

Article Title	No. of Downloads
A review of the current status and development of 5GDHC and characterization of a novel shared energ...	1,425

Top Cited Article

Article Title	No. of Citations
A review of the current status and development of 5GDHC and characterization of a novel shared energ...	18



Top Altmetric Score

Article Title	Altmetric Score
Diverse occupancy simulation and presence sensing viability for residential thermal energy regulatio...	2
Evaluating test method of air cleaning devices for ozone removal (ASHRAE RP-1579)	2

Highlights

110K 2023 Downloads	73 2023 Volume Year Publications	13 2023 Volume Year OA Publications	1.9 2022 Impact Factor	4.3 2023 CiteScore
(Blank) 2023 Acceptance Rate (%)	(Blank) 2023 Median Days Sub. to 1st Decision	28 2023 Median Days Accept. to Online Pub	Q3 2022 Impact Factor Best Quartile	Q2 2023 CiteScore Best Quartile

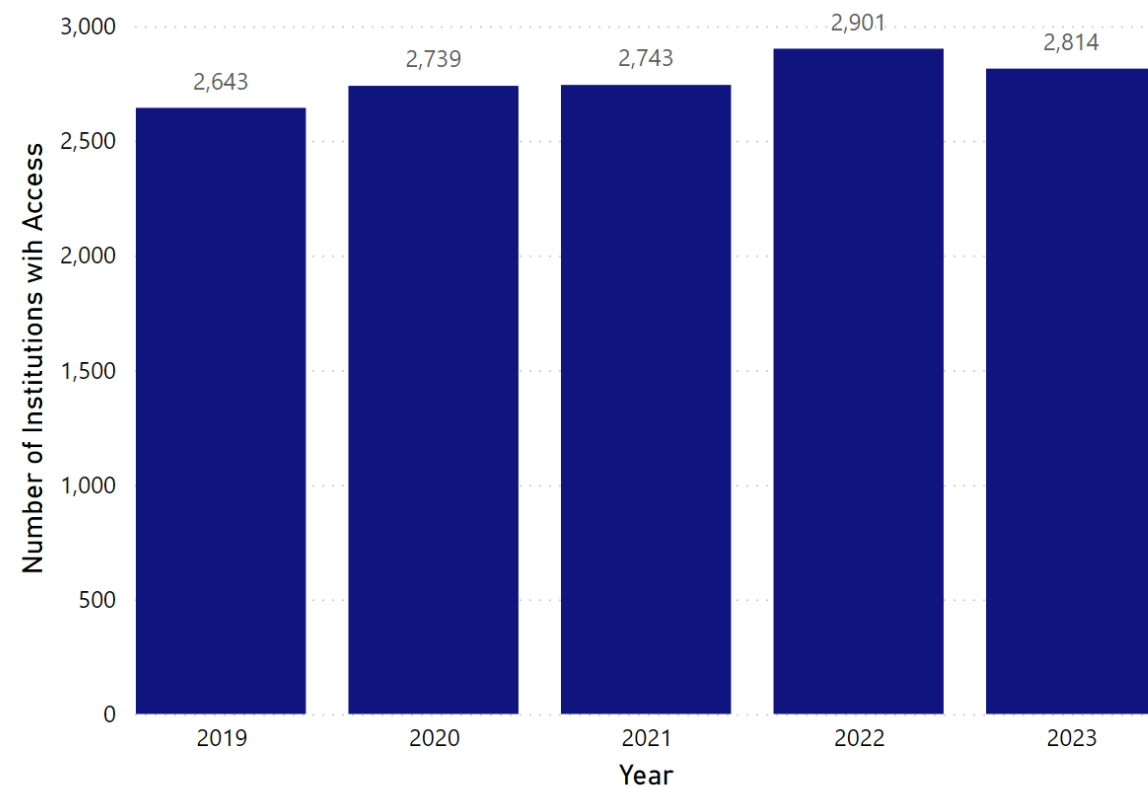
Global Reach

Global Reach - Circulation

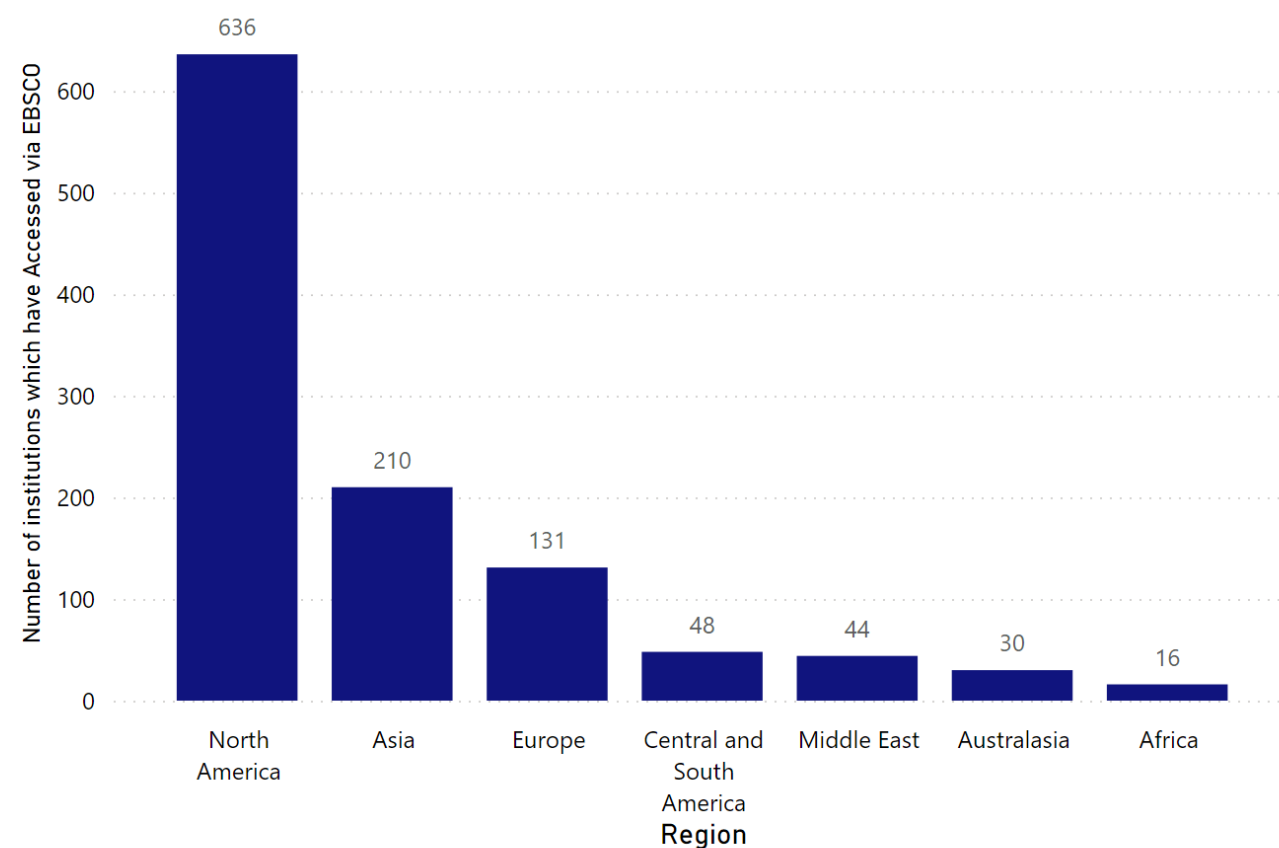
Collection Year	Subject Collection
2019	Engineering, Computing & Technology; Mathematics & Statistics
2020	Engineering, Computing & Technology
2021	Engineering, Computing & Technology
2022	Engineering, Computing & Technology
2023	Engineering, Computing & Technology

Collection Year	Library Package
2019	ST Library
2020	ST Library
2021	ST Library
2022	ST Library
2023	ST Library

Number of Institutions with access via Sales Deal, Subject and Non-Sales Deal subscriptions



EBSCO Coverage 2023 by Region



Most Downloaded Articles in the Past 12 Months (from Past Three Years)

Article Title	First Author	Volume and Issue	Open Access?	Number of Downloads
A review of the current status and development of 5GDHC and characterization of a novel shared energ...	Hans Bagge et al.	Volume 28 Issue 5	Yes	1,425
Assessing a fit-for-purpose urban building energy modelling framework with reference to Ahmedabad	Anmol Mathur et al.	Invited papers from Building Simulation 2019...	Yes	1,200
Data analysis and interpretable machine learning for HVAC predictive control: A case-study based imp...	Ryan Grammenos et al.	IAQ 2020: Indoor Environmental Quality Performance...	Yes	1,170
Airborne transmission of SARS-CoV-2 in indoor environments: A comprehensive review	Bing Dong et al.	Volume 27 Issue 10	Yes	1,150
The borehole thermal energy storage at Emmaboda, Sweden: First distributed temperature measurements	José Acuña et al.	Volume 29 Issue 2	Yes	1,119
High efficiency 3-D printed microchannel polymer heat exchangers for air conditioning applications	Erfan Rasouli et al.	Volume 28 Issue 3	Yes	932
Empirical analysis of the prevalence of HVAC faults in commercial buildings	David Yuill et al.	Volume 29 Issue 10	Yes	917
Artificial intelligence in smart buildings	Jin Wen et al.	Volume 28 Issue 9	No	880
Model-based data center cooling controls comparative co-design	Milica Grahovac et al.	2022 Building Performance Analysis Conference and ...	Yes	708
Strategies to minimize SARS-CoV-2 transmission in classroom settings: combined impacts of ventilatio...	Scott Sanders et al.	Volume 27 Issue 9	Yes	690

Top Institutions by Downloads (Past 12 Months)

Institution Name	Total No of Downloads
Hong Kong Polytechnic University	5,379
Zhejiang University	2,390
Texas A & M University System	1,233
University College London	1,158
Xian Jiaotong University	1,099
Machine Science Info Institute	927
Seoul National University	881
University of Shanghai for Science and Technology	878
Tsinghua University	876
Michigan State University	863

Note: Consortia have been removed from this table.

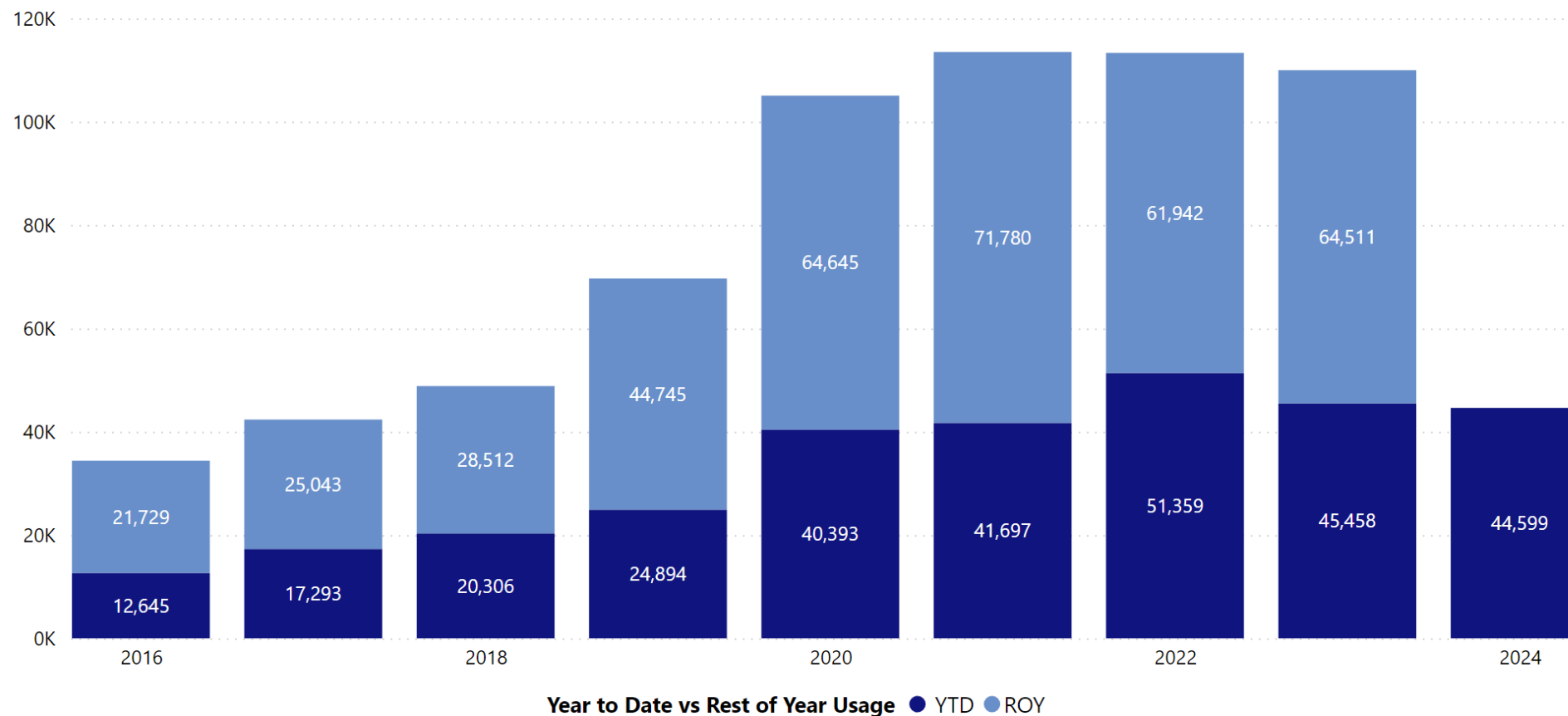
Article Downloads - Taylor & Francis Online (TFO) Usage

Latest Update Date

Data within this report is updated monthly and goes up to the end of:

▲
April 2024

Usage by Year, with Year to Date Usage



-2%

% Change Usage YTD

Article Downloads - Usage by Country & Region

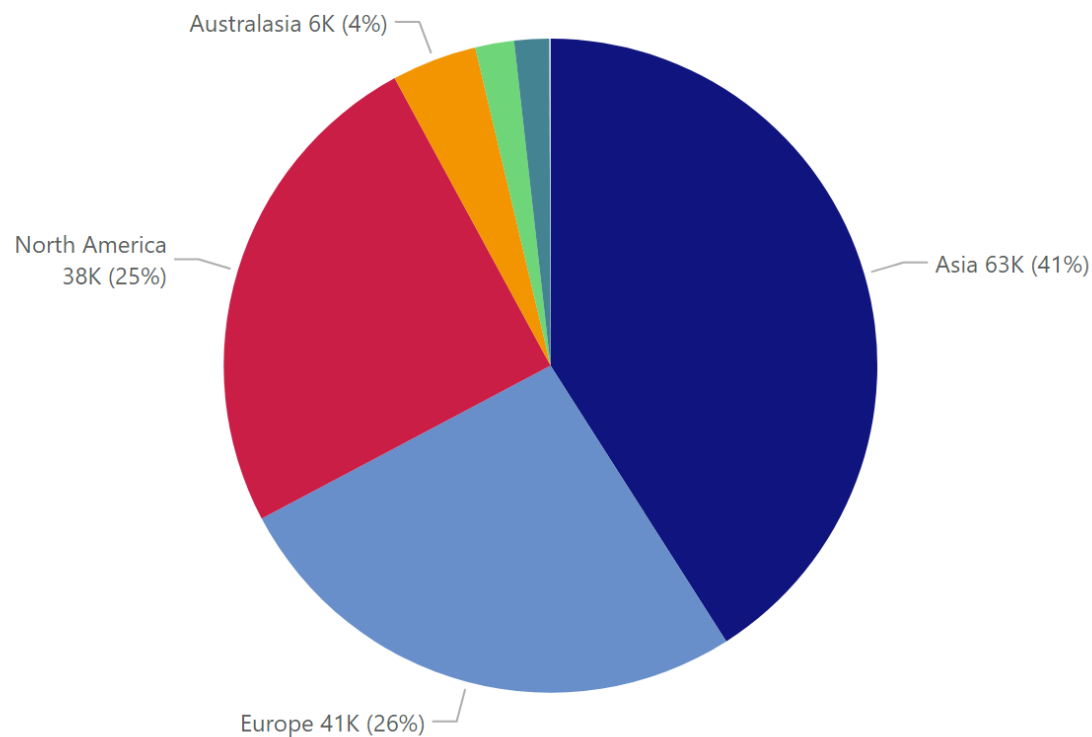
Usage shown is for the last full year, plus the current year.

Latest Update Date

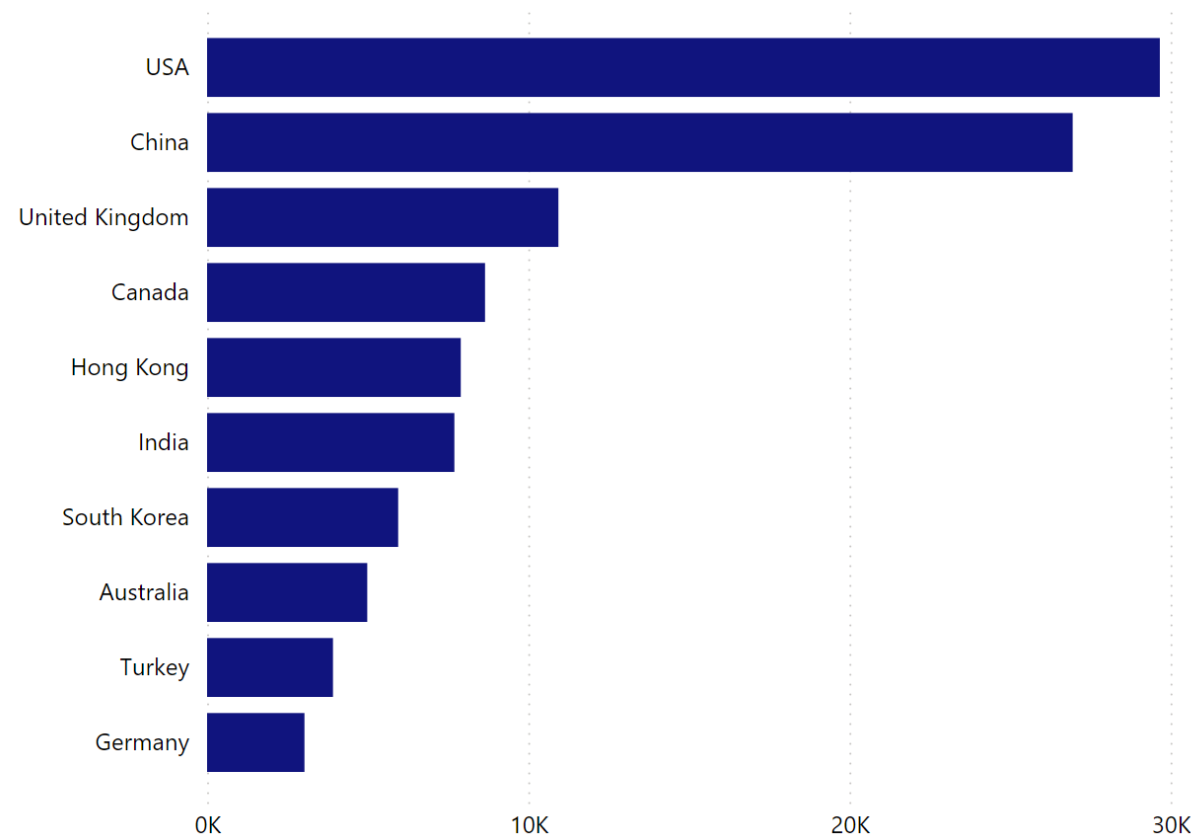
Data within this report is updated monthly and goes up to the end of:

April 2024

Full Text Downloads by Region



Full Text Downloads by Country



Production

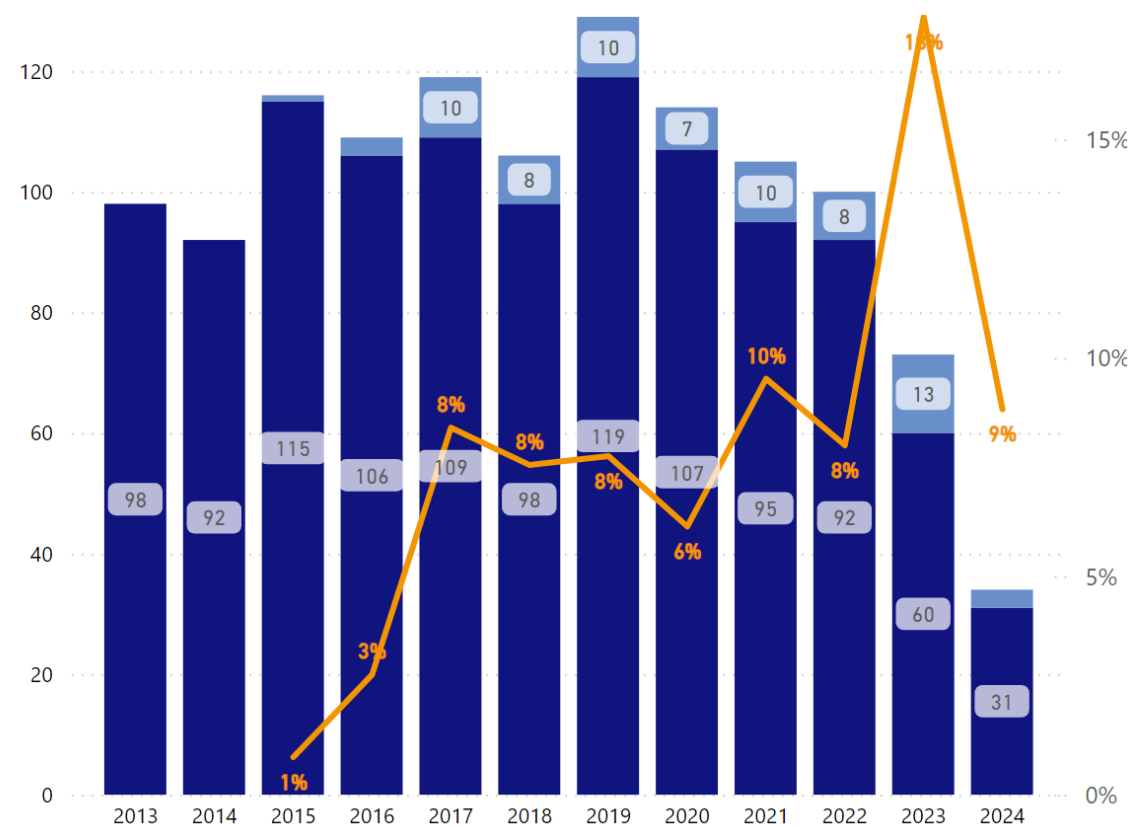
Published Content

Number of Documents by Article Type (last full year and current year)

Article Type	Count
Editorial	6
Research Article	101
Total	107

Number of Articles Published by Volume Year - with OA Split

Open Access Article? ● Non-Open Article ● Open Article ● %OA



Production Schedule (Volume Years 2023 and 2024)

Online Issues

Issue Number	2023	2024
01	20 January 2023	30 January 2024
02	30 January 2023	20 February 2024
03	28 February 2023	31 March 2024
04	25 May 2023	31 March 2024
05	08 June 2023	07 May 2024
06	31 July 2023	01 July 2024
07	30 September 2023	01 August 2024
08	18 October 2023	02 September 2024
09	30 October 2023	01 October 2024
10	30 November 2023	04 November 2024

Print Issues

Issue Number	2023	2024
01-05	12 June 2023	31 May 2024
06-10	18 December 2023	21 November 2024

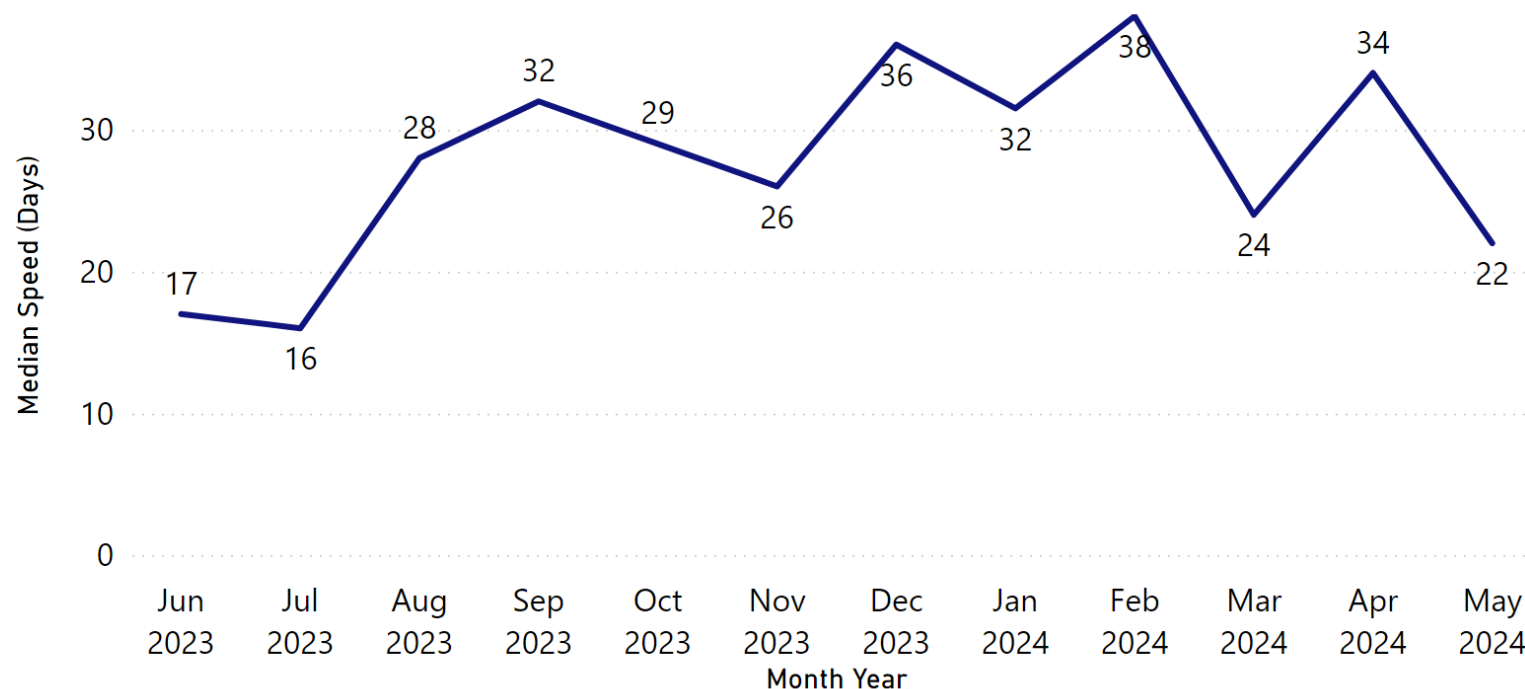
Content Flow and Article Count

Manuscript Type	Number of Manuscripts	Number of Typeset Pages
Research Article	27	414

The current backlog contains enough articles for the next 2.7 issues.

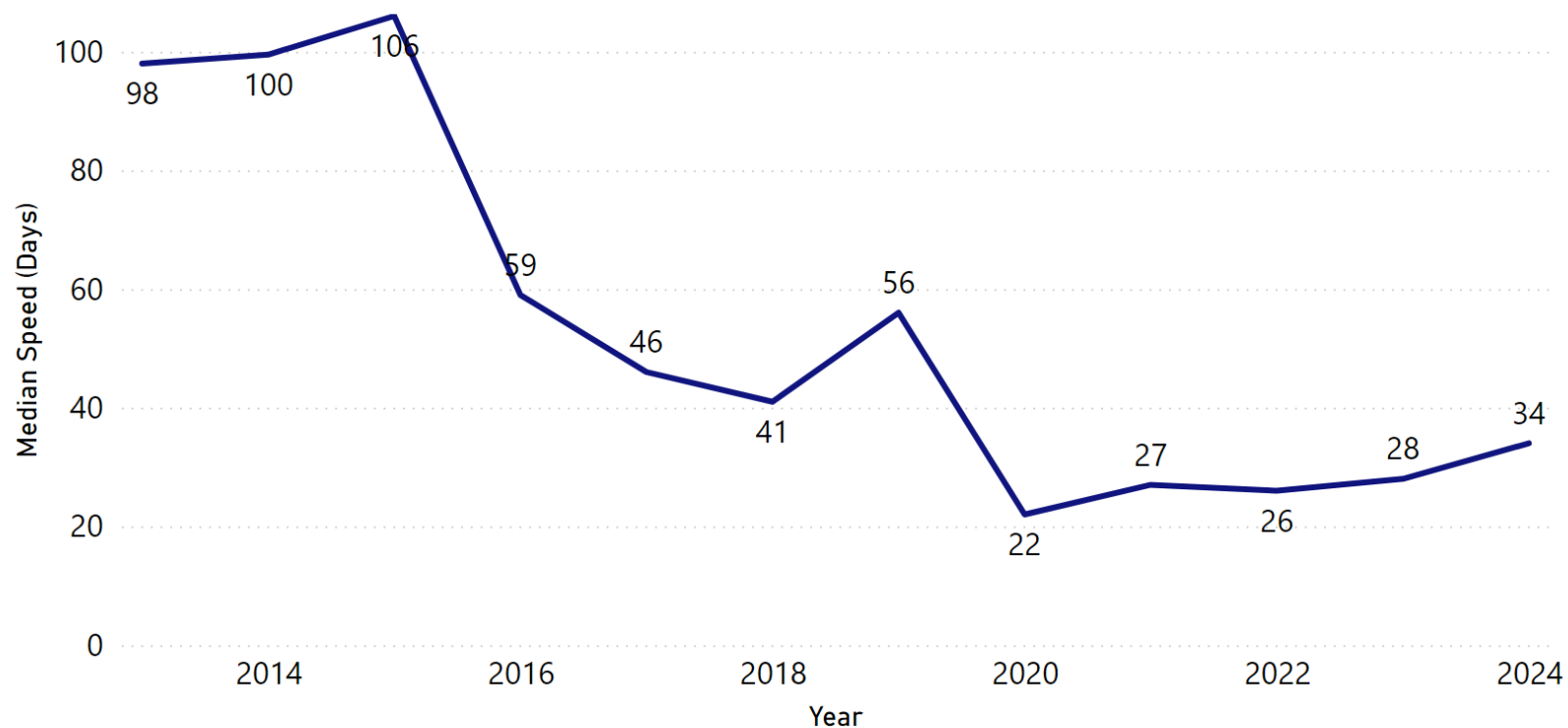
The oldest article not yet assigned to an issue was received in Production on 21 December 2023.

Average Speed of Article Publication (last 12 months)*



* median days from entered into Central Article Tracking System (CATS) to online publication.

Average Speed of Article Publication*



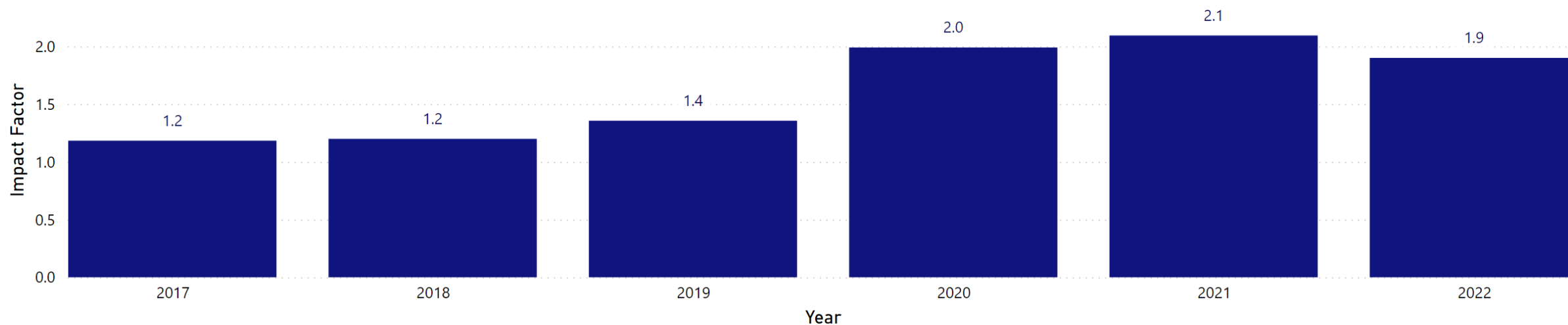
* median days from entered into Central Article Tracking System (CATS) to online publication.

Citation Analysis

Citation Metrics (Impact Factor)

Year	Impact Factor	Impact Factor Rank	5 Year IF	Article Influence	Eigenfactor
2017	1.2	(37/59 Thermodynamics, 38/62 Construction & Building Technology, 87/128 Engineering, Mechanical)	1.2	0.264	0.00100
2018	1.2	(42/63 CONSTRUCTION & BUILDING TECHNOLOGY - SCIE, 43/60 THERMODYNAMICS - SCIE, 90/129 ENGINEERING, MECHANICAL - SCIE)	1.3	0.324	0.00134
2019	1.4	42 / 63 CONSTRUCTION & BUILDING TECHNOLOGY - SCIE, 47 / 61 THERMODYNAMICS - SCIE, 96 / 130 ENGINEERING, MECHANICAL - SCIE	1.5	0.354	0.00183
2020	2.0	39 / 62 THERMODYNAMICS - SCIE, 41 / 66 CONSTRUCTION & BUILDING TECHNOLOGY - SCIE, 78 / 135 ENGINEERING, MECHANICAL - SCIE	1.8	0.418	0.00218
2021	2.1	39 / 63 THERMODYNAMICS - SCIE, 47 / 68 CONSTRUCTION & BUILDING TECHNOLOGY - SCIE, 78 / 137 ENGINEERING, MECHANICAL - SCIE	2.1	0.416	0.00215
2022	1.9	45 / 68 CONSTRUCTION & BUILDING TECHNOLOGY - SCIE, 46 / 63 THERMODYNAMICS - SCIE, 92 / 136 ENGINEERING, MECHANICAL - SCIE	1.9	0.360	0.00200

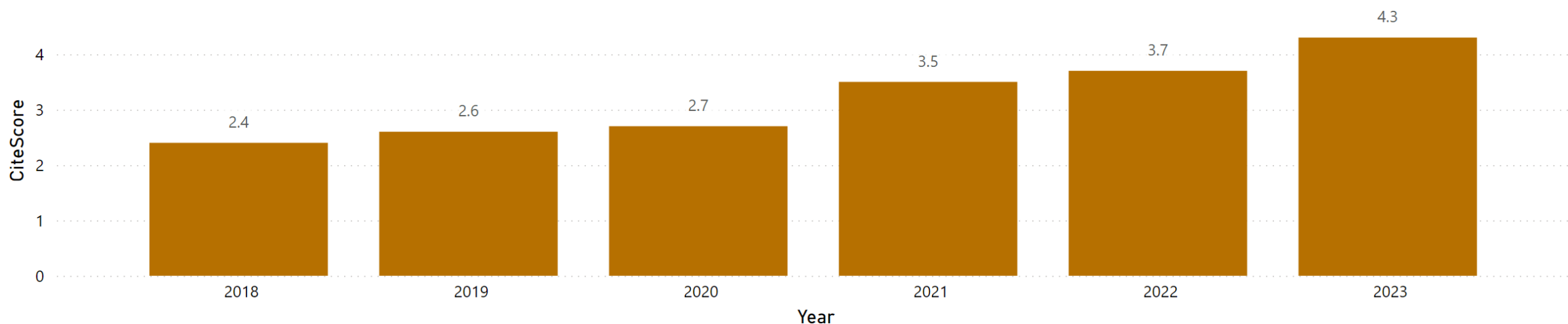
Impact Factor by Year



Citation Metrics (Scopus)

Year	CiteScore	CiteScore Rank	SNIP	SJR
2018	2.4	27 / 83 Fluid Flow and Transfer Processes, 56 / 124 Environmental Engineering, 63 / 176 Building and Construction	0.77	0.597
2019	2.6	32 / 83 Fluid Flow and Transfer Processes, 61 / 132 Environmental Engineering, 62 / 174 Building and Construction	0.83	0.594
2020	2.7	39 / 83 Fluid Flow and Transfer Processes, 70 / 185 Building and Construction, 70 / 146 Environmental Engineering	0.92	0.510
2021	3.5	38 / 87 Fluid Flow and Transfer Processes, 73 / 173 Environmental Engineering, 79 / 211 Building and Construction	0.81	0.493
2022	3.7	40 / 92 Fluid Flow and Transfer Processes, 72 / 200 Building and Construction, 85 / 184 Environmental Engineering	0.71	0.471
2023	4.3	37 / 96 Fluid Flow and Transfer Processes, 74 / 223 Building and Construction, 89 / 197 Environmental Engineering	0.70	0.461

CiteScore by Year



Top Cited Articles (Published Online in the Past 2 Years + YTD)

7.2%

% Self-Citations

Article Title	Author Name	Published Online Year	Number of Citations	Altmetric Score
A review of the current status and development of 5GDHC and characterization of a novel shared energ...	Saqib Javed	2022	18	1
A methodology to integrate maintenance management systems and BIM to improve building management	Pedram Nojedehe	2022	17	
Limitations of machine learning for building energy prediction: ASHRAE Great Energy Predictor III Ka...	Clayton Miller	2022	16	1
Airflow and contaminant transport in innovative personalized ventilation systems for aircraft cabins...	Sun Jianhong	2022	10	
IEQ assessment in free-running university classrooms	Giannis Papadopoulos	2022	8	
Physiological and psychological responses and cognitive performance with a window view	Kuniaki Mihara	2022	8	
Stochastic residential occupancy schedules based on the American Time-Use Survey	Kristen S. Cetin	2022	7	
Toward a standardized framework for thermal resilience modelling and its practical application to fu...	Ted Kesik	2022	7	
Experimental study on the heating performance of transcritical CO2 heat pump for electric buses	Zunlong Jin	2022	6	
High efficiency 3-D printed microchannel polymer heat exchangers for air conditioning applications	Vinod Narayanan	2022	6	











Citing Sources & Regions (2020 Onwards)

Citing Journal	Citing Articles - Sources
Building and Environment	169
Energy and Buildings	128
Science and Technology for the Built Environment	89
Journal of Building Engineering	64
Energies	62
Buildings	45
Applied Thermal Engineering	40
Sustainability	40
Energy	28
Applied Energy	24
Sustainable Cities and Society	23
Indoor Air	20
Applied Sciences	18
Building Simulation	17

Country name	Citing Articles - Countries
China	461
USA	261
Canada	165
India	110
United Kingdom	77
Turkey	64
Italy	59
Denmark	57
Singapore	54
Australia	52
South Korea	48
Belgium	42
Japan	41
Germany	38

Altmetric Analysis

Altmetric Analysis – Top Altmetric Scores (Past Year)

Badge	Altmetric Attention Score	Article Title	Publication Date
	388	Strategies to minimize SARS-CoV-2 transmission in classroom settings: combined impacts of ventilation and mask effective filtration efficiency	July 2021
	199	IAQ and energy implications of high efficiency filters in residential buildings: A review (RP-1649)	January 2019
	187	Associations of bedroom temperature and ventilation with sleep quality	May 2020
	119	Airborne transmission of SARS-CoV-2 in indoor environments: A comprehensive review	September 2021
	18	The Effects of Moderately Raised Classroom Temperatures and Classroom Ventilation Rate on the Performance of Schoolwork by Children (RP-1257)	February 2011
	16	The Effects of Outdoor Air Supply Rate and Supply Air Filter Condition in Classrooms on the Performance of Schoolwork by Children (RP-1257)	February 2011
	8	Experimental and numerical study on the thermal plumes of a standing and lying human in an operating room	August 2021
	6	Miscibility of POE and PVE oils with low-GWP refrigerant R-1234ze(E)	October 2016
	6	Supervisory and Optimal Control of Building HVAC Systems: A Review	February 2011
	6	Optimization of HVAC Control System Strategy Using Two-Objective Genetic Algorithm	February 2011

Overview and Source Breakdown of Altmetric Attention (Past Year)

Total Mentions

1364

Total mentions for research outputs in this report.

Outputs with
Mentions

34

Total number of research outputs in this report that
have Altmetric mentions

Research Outputs

34

Total number of research outputs in this report,
including those without mentions

ATTENTION SOURCE BREAKDOWN

The number of mentions from each source that Altmetric has tracked for the research output in this report



41

News mentions



3

Blog mentions



1224

Twitter mentions



0

Facebook mentions

<https://www.altmetric.com/explorer/report/269fecca-3cf3-409d-956b-56161e477766>

Journal Homepages

Recent SEO and accessibility developments include:

Breadcrumbs

Short descriptors

Text to speech

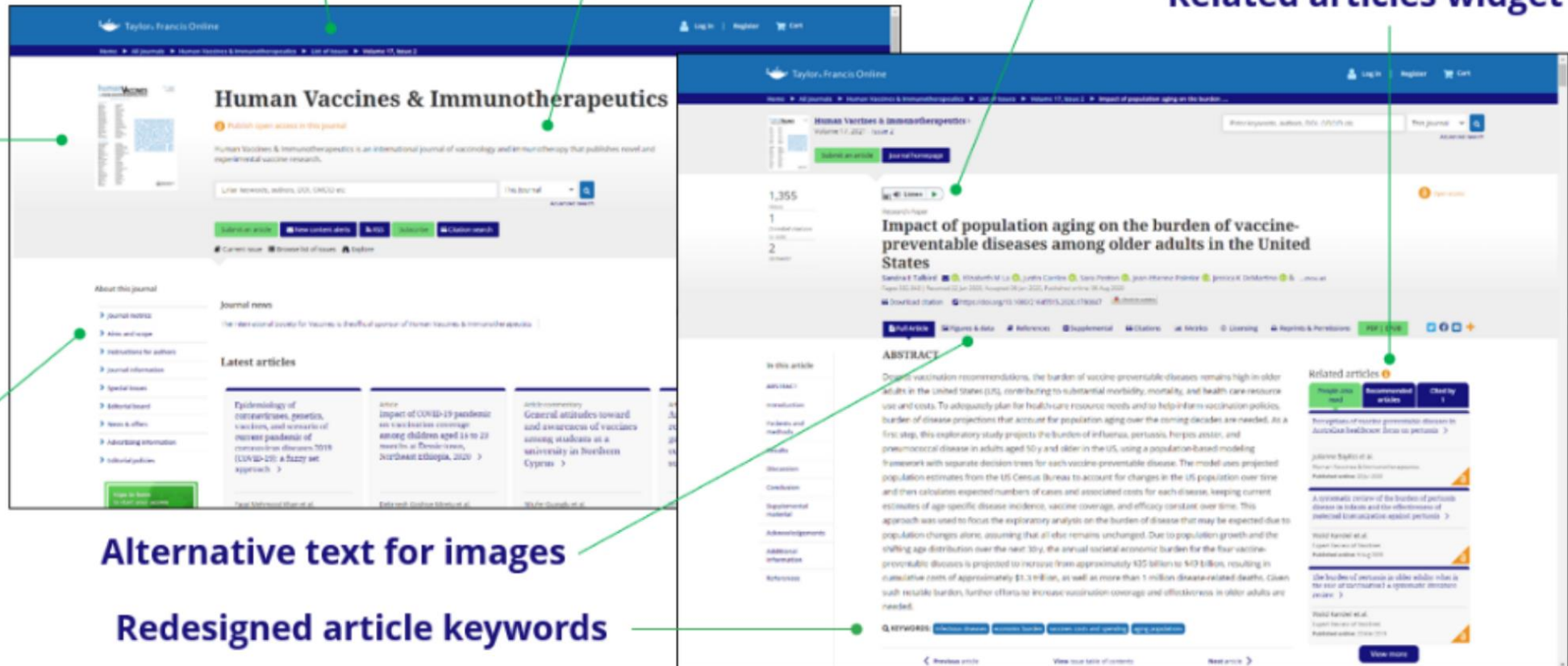
Related articles widget

Faster page
loading
speed

Optimised
Aims & Scope

Alternative text for images

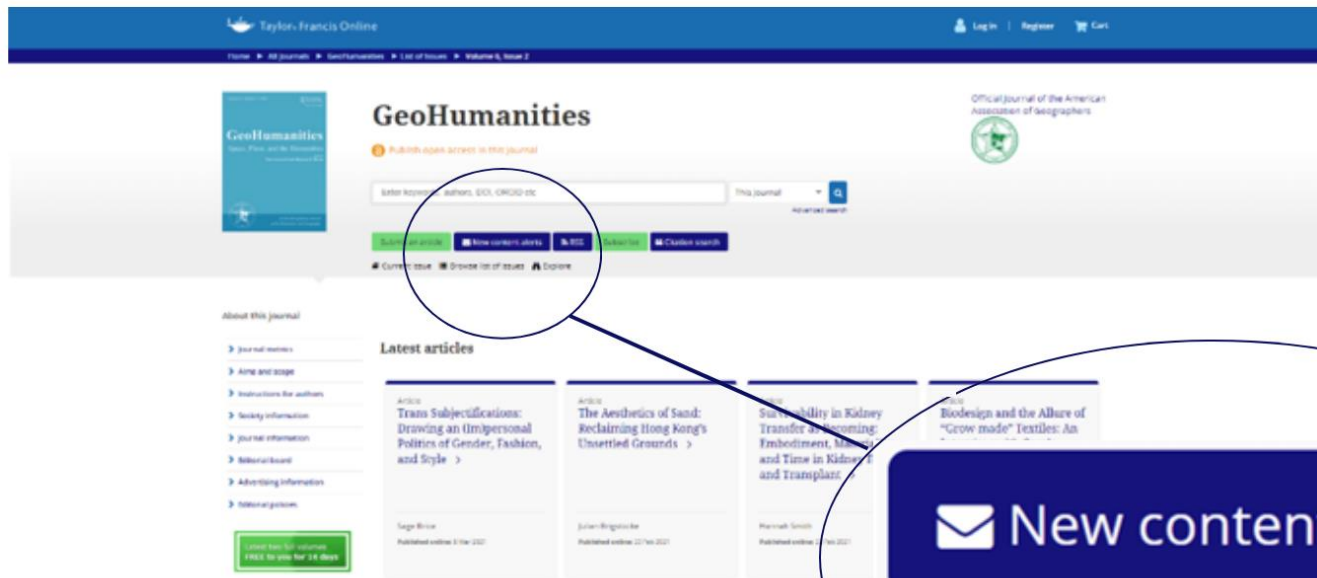
Redesigned article keywords



New Content Alerts

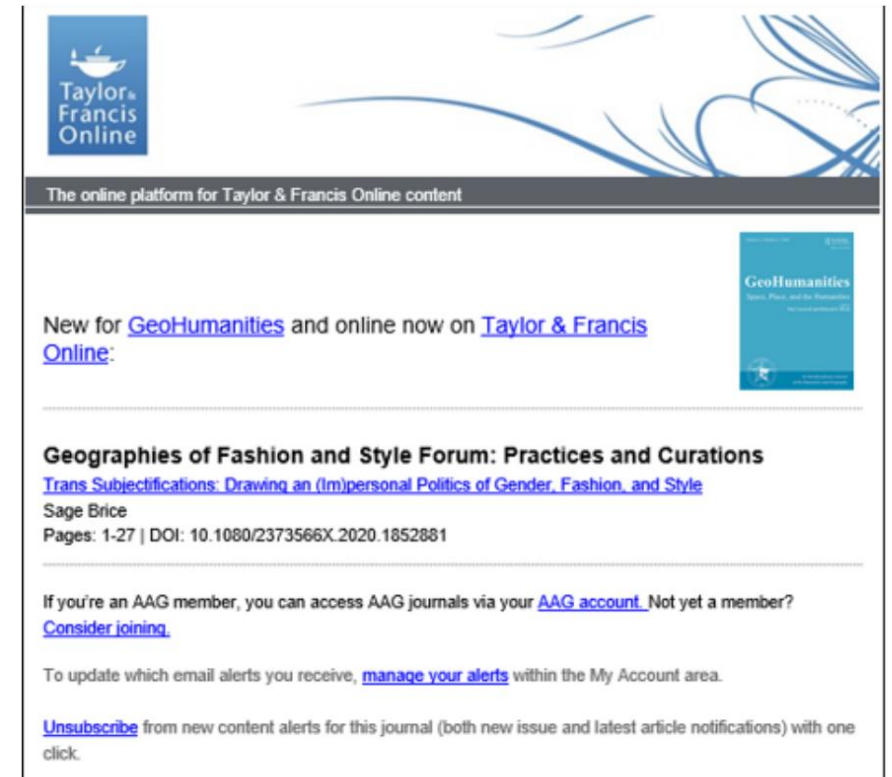
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five emails:



staggered over
one year



these include
article metrics



and encourage
social sharing



38%
open rate



5.5%
click rate

all authors receive these emails as a service email
(marketing opt-in is not required)

*2022 Media & Publishing email benchmarks (Mailchimp)
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click rate

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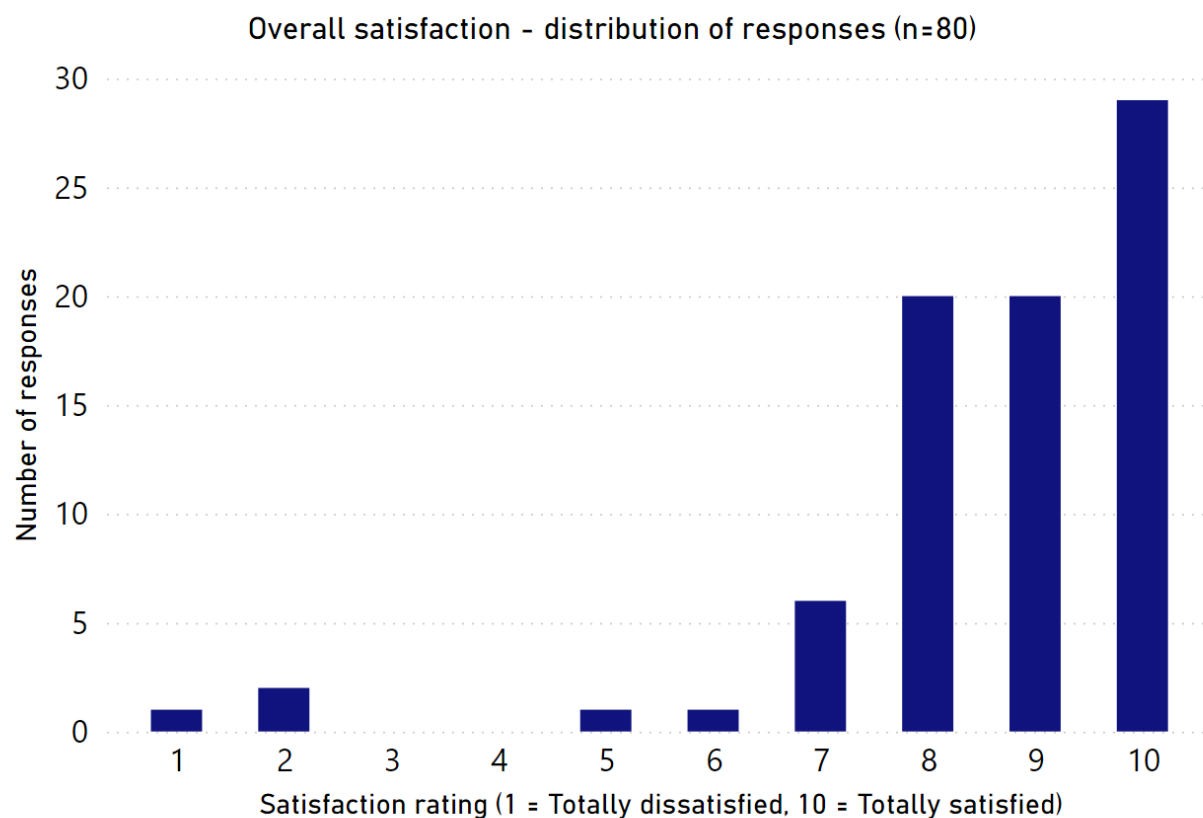
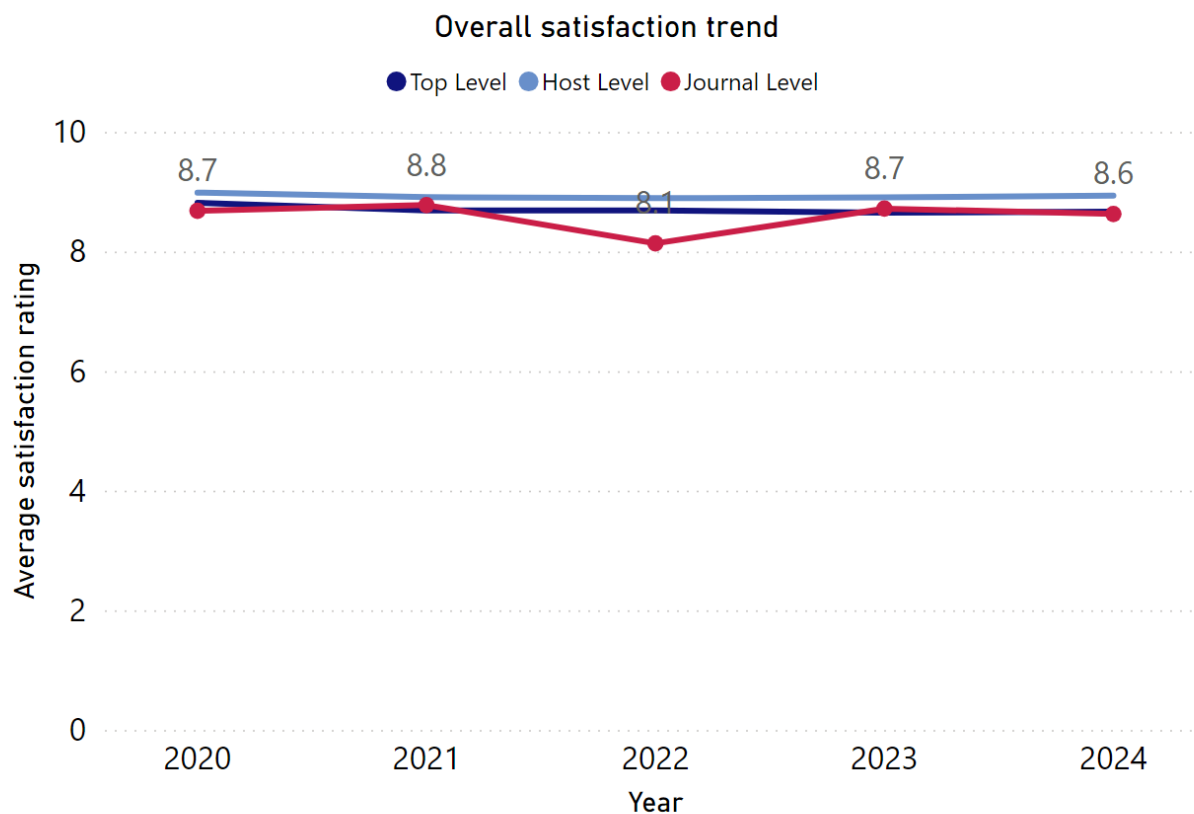
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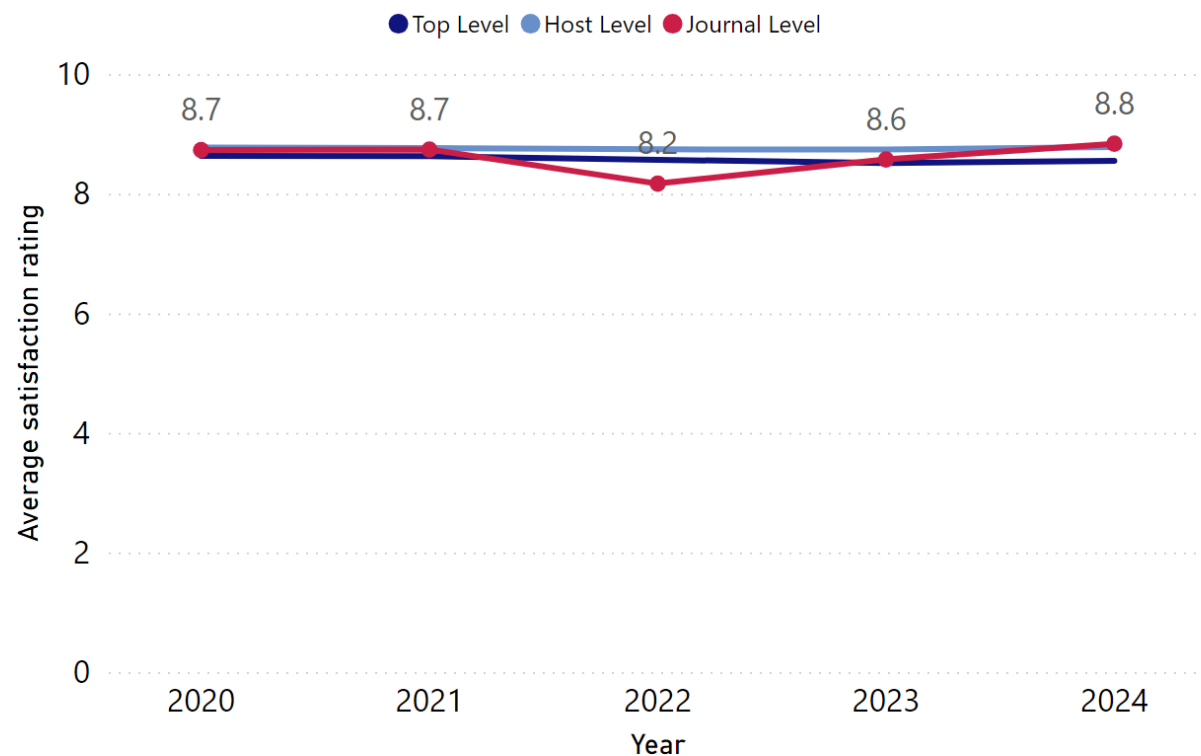
Author Survey

Author Survey - Overall Satisfaction

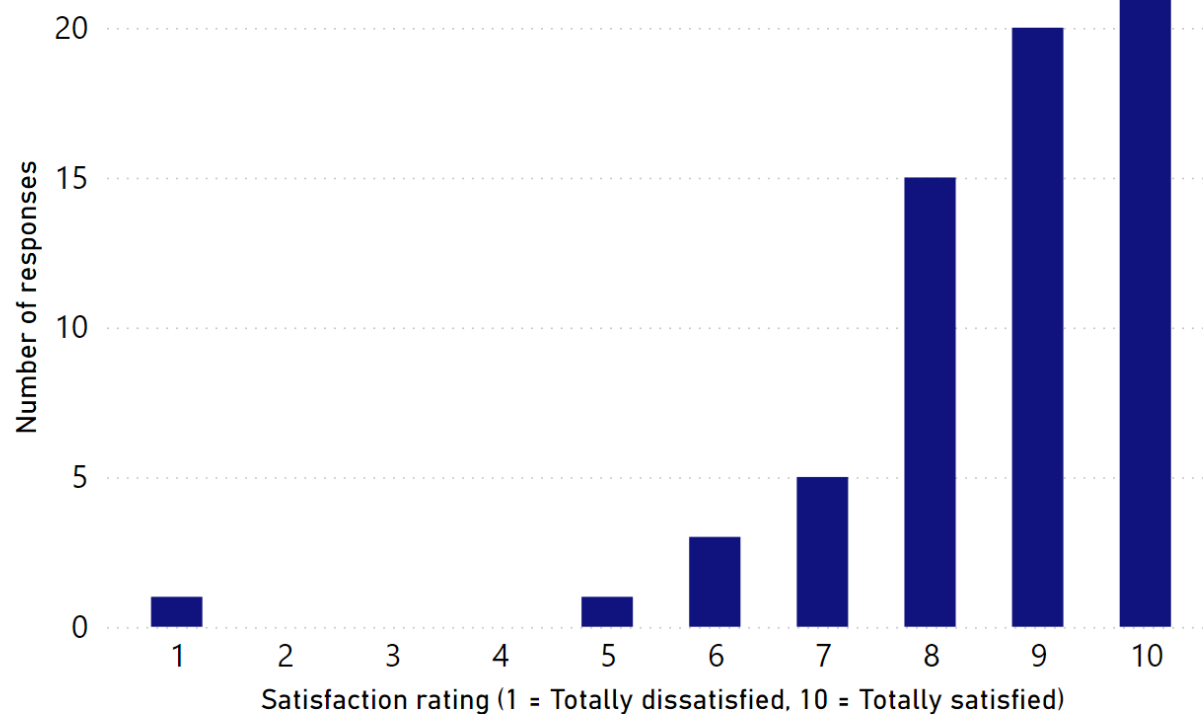


Author Survey - Satisfaction with Refereeing Process

Satisfaction with peer review process trend



Satisfaction with peer review (n=66; Average=8.6)



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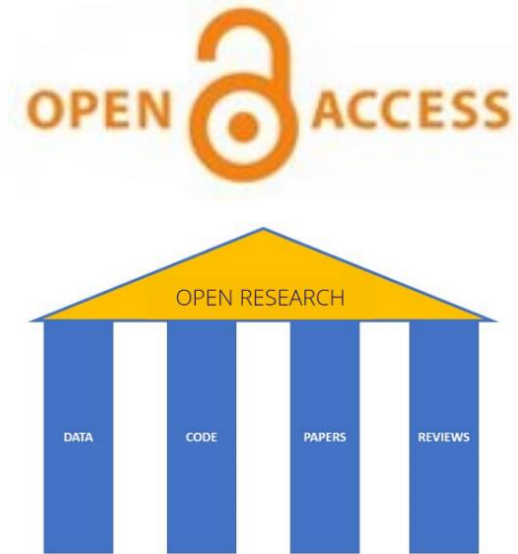
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Data availability statement	Highly encouraged	Mandatory	Mandatory	Mandatory	Mandatory
Persistent identifier for data	Highly encouraged				
Data citation	Highly encouraged				
License applied to data set	Author's choice				

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ASHRAE Roundtables Review and Findings

January 2024

Notes have been collected for some 15 roundtable discussions held between May 2022 and December 2023. The roundtable reports are available on the BOD Basecamp [here](#). Appendix A provides a simple executive summary of each roundtable. (Note: Other roundtable discussions may have occurred, but notes were not available. A roundtable discussion took place in Florida in mid-January that is not included below.)

Fully 9 of the 15 roundtable discussions (60%) were held **outside of the U.S.** The locations are listed below in the order in which they were held.

1. Region VI CRC Minneapolis, May 2022
2. **Region XIII CRC Tokyo, Aug. 19-20, 2022**
3. **Region XIV CRC Madrid. Sept. 9, 2022**
4. **RAL CRC Istanbul, Oct. 9-14, 2022**
5. Atlanta Winter Conference, Feb. 3, 2023
6. **Region VIII CRC Monterrey, May 7, 2023**
7. Tampa Annual Meeting, June 27, 2023
8. Region VII CRC Louisville, July 7, 2023
9. **Region XII CRC Trinidad, Aug. 11, 2023**
10. **Region XIV CRC Galway, Aug. 11, 2023**
11. Region I CRC, Connecticut Aug. 18, 2023
12. Region X CRC Reno, Aug. 18, 2023
13. **Region XIII CRC, Taiwan, Aug. 18-19, 2023**
14. **Brazil, Sep. 11, 2023**
15. **Goa, India, Dec. 11, 2023**

Are Roundtable Discussions Valuable?

Market intelligence gained from roundtables is very valuable. Conducting roundtables should be adopted as a best practice for all CRCs. Members Council should provide to the BOD summaries from Summer/Fall CRC roundtables at the Winter Conference and from Spring CRC roundtables at the Annual Meeting. Recommendations for BOD action should be included. Roundtable notes should be archived on the BOD Basecamp site.

Guidelines for conducting roundtables should be added to the CRC Manual (Section C and Appendix CC). Members Council will need to determine how to administer the CRC roundtables, and the Region Operations Subcommittee (ROS) seems to be a good fit for this task. The ROS, perhaps in consultation with the DRC Forum, could develop 2-3 trending questions that will be asked at all CRC roundtables each Society year. The relationship between the roundtables and employer recognition/outreach functions should be evaluated.

Roundtables may also be held during visits by senior volunteers during Regions, Chapters or conferences. The visiting volunteer is responsible for passing roundtable notes to the Members Council task group for evaluation.

Broaden ASHRAE's Target Audience

The need to broaden ASHRAE's community to include both owner/operators and technicians/contractors was cited at several roundtables.

- According to the November 2023 dashboard, ASHRAE has 4,747 contractor members and 2,947 design/build members for a total of 7,694 or 14% of 53,760 members. Despite being the 3rd largest segment of ASHRAE's membership behind design engineers and manufacturers/ reps, **ASHRAE offers few programs designed specifically for contractors.**
- Lack of qualified technicians is seen as a universal problem at roundtables. Advance MEP systems cannot be deployed without skilled technicians for both installation and service. Refrigeration technicians in particular are cited as being in low supply as demand for cooling grows globally.
 - The transition to mildly flammable, low GWP refrigerants underscores **the need to provide training to both current and new technicians.**
 - More complex mechanical and control systems will require technicians with higher skill sets.
- Improved communication between the owner/operator and the design communities is critical to accelerate the transition to healthier and more sustainable buildings. Increase owner/operator participation in ASHRAE is cited as benefitting the mechanical design community and ASHRAE's mission.
 - One roundtable suggested that ASHRAE create an industry collaboration platform to bring together the full spectrum of building design and operation professionals.

Practical Guidance/Tools Needed

ASHRAE is the undisputed top global technical resource for HVAC systems. However, the Society lacks guidance on practical implementation of complex design best practices. Standards and handbooks are best-in-class, but **simplified guidance is needed to bridge the gap between theory and implementation.**

This issue is tied to workforce development. The 'gray tsunami' of retirements drives the next generation's need for practical implementation guidance. **Traditional delivery of technical information in printed/electronic handbooks is not appealing to younger generations. Videos, apps, online tools, and interactive training is considered more valuable than complex printed guidance.**

Similarly, guidance is needed on how to navigate through ASHRAE's volumes of technical guidance, training programs, publications and standards. Roundtable participants often cited difficulty in finding relevant information.

Young current and prospective members learn differently (interactively) and respond to being challenged. Practical solutions must be delivered in new ways to have broad appeal.

Labor Shortages are a Universal Issue

Workforce development was cited as a key issue at virtually every roundtable. Note that the workforce development conversation was prompted by questions in some roundtables rather than being volunteered independently by roundtable participants.

There was a universal call to improve the understanding of and the appeal of careers in HVAC&R (“convince me to be an HVAC&R engineer”).

- Short videos
- Training needed to accelerate the learning curve of those new to HVAC&R.
- Tie HVAC&R buildings engineering to solving the climate crisis.

Chapters/Regions Need Flexibility, Resources for Localized Solutions

Challenge and opportunities differ widely in regions around the world, underscoring the importance of empowering and resourcing Chapters/Regions to provide localized benefits and services.

The degree to which language is a barrier for standards, training, etc. varies widely. For example, English is not a barrier in India but is considered an issued in Brazil and Turkey. Grid limitations is a significant issue driving energy efficiency in Monterrey. Declining population in Japan exacerbates HVAC&R workforce shortages.

The cost of ASHRAE products and services is a well-documented and growing issue for many countries, often driven by inflation, political turmoil and current valuations.

Practical Refrigerant Transition Strategies and Training is Needed

The transition to low-GWP refrigerants is paced differently around the globe. Standards and regulatory timelines are not aligned. Several roundtables underscored the important of aligning refrigerant strategies.

A strong need for comprehensive training on the design and maintenance of systems using mildly flammable refrigerants. The need for that training varies widely by region based on the regulatory timing. It is needed for design, but more significantly needed for technician/contractor/owner operation and maintenance.

Networking is Universally Valued

Multiple roundtables underscored the value of connecting with ASHRAE’s global network of building professionals as a primary benefit of ASHRAE. The Society would be well-served to identified and increase opportunities for networking throughout the Society. Creating opportunities for cross-discipline networking between designers, contractors, researchers, building owners, and manufacturers was recommended as being particularly valuable.

Appendix A. Abbreviated Roundtable Highlights

- **Region VI CRC Minneapolis, May 2022**
 - Younger HVAC workers have a different learning style (video vs. reading).
 - Younger new employees want to be challenged and given responsibilities early.
 - A lot of people attracted to industry were prompted by scholarship/internship opportunities.
- **Region XIII CRC Tokyo, Aug. 19-20, 2022**
 - SHASE is the predominant Society. ASHRAE is second to SHASE. Need to strengthen collaboration with SHASE.
 - Networking is valued.
 - Technical info is valued.
 - Requests: Refrigeration, more networking, better weather data, decarbonization, BACNET, BIM
 - Labor shortages are an issue. Workforce development. Labor force decreasing 5% per year.
 - Going different directions on refrigerants
- **Region XIV CRC Madrid. Sept. 9, 2022**
 - Data centers important issue
 - Need Spanish language courses.
 - Need local technical information.
 - ATECYR sees ASHRAE as a competitor.
 - Some don't trust American ASHRAE standards. Promote standards at universities.
 - Harmonization of refrigerant standards
 - Need industry standards for replacement of low efficiency equipment.
 - Oversizing equipment is an issue.
 - HVAC is not appreciated. Not a preferred career.
- **RAL CRC Istanbul, Oct. 9-14, 2022**
 - Lack of engineering licensure is an issue in some countries.
 - Promote ASHRAE certifications.
 - Language is a barrier. Printed materials can be in English.
 - ASHRAE Standards used for Cooling; ISO/CEN used for heating.
 - Transition from prescriptive to performance-based standards
 - Translation of standards might help.
 - Research programs need to be practical.
 - Low cost vs. quality equipment is an issue.
 - Promote commissioning.
 - Cost of dues, programs.
- **Atlanta Winter Conference, Feb. 3, 2023**
 - Need more owners involved in ASHRAE. Better connections between owners and designers
 - Need to focus on existing buildings (control sequences)
 - Workforce development
 - Accelerate young engineers acquiring field smarts.
 - Need to promote value of careers in HVAC. Make it more appealing.

- Need guidance from ASHRAE on what should be included in equipment O&M manuals from mfgs.
- Can ASHRAE accelerate use of AI by design firms? Need better integration across disciplines. Still too siloed.
- **Region VIII CRC Monterrey, May 7, 2023**
 - Substantial grid limitations for Monterrey development. Energy efficiency is part of that solution.
 - No enforceable energy codes, only code guidelines that reference 90.1.
 - No requirement for buildings to be designed by licensed engineer.
 - LEED, WELL and Edge are popular in Mexico.
 - Buildings have efficient equipment but poor envelope.
 - Opportunities: promote standards and advocate for change
 - Fire and Fuel gas codes enforced. Energy efficiency not enforced.
 - Hospitals are highly regulated and followed ASHRAE standards.
 - Need to promote careers in HVAC at all levels. Open up ASHRAE membership to technicians.
 - Make HVAC exciting. Tie to climate change. Short videos.
 - More products in Spanish would help promote ASHRAE.
- **Tampa Annual Meeting, June 27, 2023**
 - Big increase in heat pump usage
 - Not much client interested/understanding of scope 1,2,3 emissions. Focused on energy conversation.
 - Local law 97 – focus on avoid penalties. ROI for replacing fossil fuel boilers not justified.
 - Increase use of DC current – related standards needed.
 - Need to merge mechanical/electrical engineering and eliminate silos.
 - Silver Tsunami is an issue for workforce development.
 - 60 second WfD videos
 - Need guidance on how to navigate volumes of ASHRAE technical information.
 - Confusion about flammable refrigerants
- **Region VII CRC Louisville, July 7, 2023**
 - Workforce development is the most critical issue.
 - Soft skills are a bigger issue after the pandemic, but not sure that is a focus for ASHRAE.
 - Design firms are following clients to organizations like ASHE and AIA.
 - Chapter meeting diversity is an issue.
 - Survey conducted ahead of the
- **Region XII CRC Trinidad, Aug. 11, 2023**
 - Cost of membership is a big issue.
 - Getting young people involved is an issue. There is a mentorship gap.
 - COVID hurt soft skills development.
 - Employer support is critical.
 - Technician training is needed. Not a strength for ASHRAE.
 - Include AI in training. How to use AI?
 - Need tools for maintenance assessments and energy audits.
 - Explain how to undertake refrigerants transition on practical level.
- **Region XIV CRC Galway, Aug. 11, 2023**
 - No. 1 issue is workforce. Engineers and technicians.
 - Pace of regulatory change is accelerating. Need ASHRAE guidance.
 - Refrigerant training is an issue.

- Education through apprenticeships
- Help line for design engineers.
- ASHRAE perceived as too American .
- Awareness – I didn't know ASHRAE before this meeting.
- **Region I CRC, Connecticut Aug. 18, 2023**
 - Need help with load calculation tools. Can't do through the handbook. Need online tool. Get handbook on phone.
 - Most students have never heard of ASHRAE.
 - Training needs to be interactive.
 - Disappointment that OPMP certification went away when operations is so important.
 - Manufacturer training is very good. Can ASHRAE be a clearinghouse for vetted mfg training?
 - AIA has vendor training that is accredited by AIA.
 - Standardize naming conventions and terminologies across vendors.
- **Region X CRC Reno, Aug. 18, 2023**
 - Wildfires are an issue for IAQ.
 - Need to engage with contractors.
 - Training of new hires is difficult. No one is ready out of the box.
 - Need to simplify ASHRAE technical info.
 - YEA leadership weekend is great.
 - Need to connect building energy efficiency with climate change.
- **Region XIII CRC Taiwan, Aug 18-19, 2023**
 - Decarbonization is important.
 - Accelerate tech transfer from Society to grassroots.
 - Workforce develop is critical. Educate building owner clients.
 - Simplified
 - TAB training needed.
 - Translation of training is critically important. Cost of textbooks too high.
 - Carbon fees coming to Taiwan with energy savings generating carbon credits.
- **Brazil, Sep. 11, 2023**
 - Need training and materials in Portuguese. In-person training is preferred. Train the trainer programs.
 - Lack of building and energy efficiency codes in Brazil is a problem.
 - Work with ABRAVA
 - Cost of membership is an issue.
 - ASHRAE influence declined because of influence from European and Asian mfgs.
- **Goa, India, Dec. 11, 2023**
 - Building owner training needed
 - ASHRAE should create an industry collaboration platform.
 - Requests for EPDs are growing.
 - No one in India uses ASHRAE certification.
 - Language not an issue in India.
 - Guidebooks should be marketed to architects, not just engineers.
 - Need training on how to apply standards.
 - Collaborate with mfgs on training.
 - Green building rating systems very popular in India.
 - Workforce development is critical -- Convince me to be an HVAC engineer.



Certification Committee Report to Professional Development Subcommittee of PEC Meeting of June 24, 2024

Motions

None.

Information Items:

1. Record Certification Applications [MBO 2]

ASHRAE will receive a record **700+** applications in 2023-24, which is a **45% increase** over the 2022-23 near record total of 482 applications.

2. New Decarbonization Professional Certification [MBO 15]

Having received over 100 applications since March 1, the Certified Decarbonization Professional ([CDP](#)) certification is on track to administer the first CDP certification exams beginning June 25, 2024.



3. Record Certification Exam Study Guide Uptake [MBOs 3, 4 and 5]

Through May 31, 2024, **over 1,100 study guides** have either been sold or selected as a renewing full Member benefit.

- [Certification Study Guide: Certified HVAC Designer \(CHD\)](#)
- [Certification Study Guide: Building Commissioning Professional \(BCxP\)](#)
- [Certification Study Guide: Building Energy Modeling Professional \(BEMP\)](#)

4. **ANSI Annual Surveillance** [MBO 4.1]

Following ANSI National Accreditation Board (ANAB) assessor team evaluation of ASHRAE's "Year 4 Annual Surveillance" application, ASHRAE Certification programs were granted an additional year of **continued accreditation** under the ISO/IEC 17024:2012 accreditation standard.

5. **2024-27 Exam Subcommittee Members** [MBO 4.3]

Approved slate of nominees and alternates for seven Exam Subcommittees for the 2024-27 term. The slate was developed from a pool of 86 self-nominations.

6. **Certification Committee 2023-2024 MBOs are included as an attachment.**

Respectfully submitted,
Nick Armstrong, Certification Committee Chair
June 24, 2024

Council: Publishing & Education

Committee: Certification

MBO #	Description	Metric
		(how do we determine success?)
1	Attain 80% recertification rate for the 2023 renewal class.	If 80% attained
2	Grow the number of certification applications by 10% over the 2022-23 total of 477, to a total of 525 applications.	If 525 applications attained
3	Achieve 500 sales and selection as renewing full Member benefit of BCxP Study Guide.	If uptake of 500 achieved
4	Achieve 300 sales and selection as renewing full Member benefit of BEMP Study Guide.	If uptake of 300 achieved
5	Achieve 300 sales and selection as renewing full Member benefit of CHD Study Guide.	If uptake of 300 achieved
6	Develop Certified Decarbonization Professional (CDP) Study Guide.	If CDP Study Guide developed.
7	Ensure consistent recognition of ASHRAE certificant designations in ASHRAE print and electronic media wherever the P.E., P.Eng. and Ph.D. designations also appear.	If recognition is consistent
8	Leverage Chapter Technology Transfer Committee (CTTC) channels for enhanced communication.	If CTTC channels enhance communication.
9	Collaborate with YEA Committee and Staff to identify and pursue opportunities to position ASHRAE Certification as career development goal.	If opportunities are identified and pursued to position ASHRAE Certification as a career development goal for YEA Members.
10	Cross-promote certification and online, instructor-led training (fall and spring) for each certification program on ashrae.org.	If cross promotion takes place.
11	Liaise with Global Technical Interaction Committee (GTIC).	If liason with GTIC takes place.
12	Manage certification programs against the ANSI/ISO/IEC 17024 accreditation standard.	If ASHRAE maintains its accreditation.
13	Conduct HFDP Job Task Analysis (JTA) to begin 7/1/2023.	If the HFDP Job Task analysis is conducted.

14	Conduct BEMP and HBDP exam development against JTA updates and launch new exam forms.	If exam development takes place and new exam forms are launched.
15	Launch new Certified Decarbonization Professional (CDP) certification.	If CDP certification is launched.
16	Recruit 2024-27 class of Exam Subcommittee members.	If the 2024-27 class of Exam Subcommittee members is recruited.
17	Pursue opportunities to strengthen the Security of Examination Materials (ANSI 7.4) procedure for Item Development.	If the Security of Examination Materials (ANSI 7.4) procedure for Item Development is strengthened
18	Monitor and report on developments in the security of remote proctoring.	If developments in the security of remote proctoring are reported to the Certification Committee
19	Monitor the effectiveness of certification programs and recommend and implement any steps to improve program effectiveness.	If the effectiveness of certification programs is monitored and any recommended steps to improve program effectiveness are implemented
20	Evaluate the certification and recertification application fee schedule and recommend any possible updates in the 2024 Winter Conference meeting.	If this evaluation takes place.
21	Conduct ongoing strategic planning.	If ongoing strategic planning is conducted.
22	PEC MBO #3: Develop new products & services aligned with Strategic Plan initiatives 1 & 2 (ETF & TFBD).	If new products and services are developed.

Chair: Nick Anderson
 Vice-chair: Suz Ann Arroyo

Initiative #	Goal #	Completion % /Date	Financial Assist Req'd?
4	2	3/31/2024	No
4	3	6/30/2024	No
4	3	6/30/2024	No
4	3	6/30/2024	No
4	3	6/30/2024	No
4	3	6/30/2024	Yes. Foundation funding received.
4	2	6/30/2024	No
4	2	6/30/2024	No
1	1	6/30/2024	No
3	1	6/30/2024	No
4	2	6/30/2024	No
4	2	6/30/2024	Budgeted
3	3	1/31/2024	Budgeted

4	2	6/30/2024	Budgeted
4	2	6/30/2024	Budgeted
4	2	6/30/2024	No
3	3	6/30/2024	No
3	3	9/30/2023	No
4	3	6/30/2024	No
4	3	1/31/2024	No
3	3	6/30/2024	No
1	1	6/30/2024	No

MBO Comments	Strategic					
	Initiative #				Goal 1	
	1	2	3	4	a	b
77% attained in 2023, versus 79% recertification rate attained in 2021 and 2022. 76% = average for certification programs with 3-year renewal periods.				x		
Achieved. 700+ attained through 6/23.				x		
In progress. 370 sold or selected through 5/31.				x		
Achieved. 312 sold or selected through 5/31.				x		
Achieved. 438 sold or selected through 5/31.				x		
Content is in development.				x		
Ongoing.				x	x	
Certification highlights presented at CTTC meetings at Winter and Annual Conferences				x		
Per YEA staff and volunteer leaders, "YEA Connections" e-newsletter, YEA social media, and YEA webinar are possible opportunities.	x				x	
Completed for fall 2023 and spring 2024 instructor-led ALI courses.			x		x	
Certification Committee rep attended GTIC meeting at Winter Conference.				x		
Ongoing. Year 4 Annual Surveillance application evaluated by ANSI in spring, 2024. Two non-conformities resolved. Accreditation for one additional year achieved.				x		
Completed.			x			

Rescheduled to begin summer, 2024.				x		
Completed. Examination window to open June 25.				x		
Completed. Slate approved in June 22, 2024 meeting.				x		
			x			
Ongoing. Completed for 2023-24. Staff attended annual ANSI National Accreditation Board (ANAB) Client Day meeting on Sept. 25. No developments reported. Peers report endemic cheating.			x			
				x		
This is a 2024-25 MBO.						
Completed. Application fee schedule evaluated and updates recommneded. Subsequently, approved by Director of Publications and Education. To take effect July 1, 2024.				x		
Completed. SWOT analysis update tootk place in June 22, 2024 Certification Committee meeting.			x			
SY 2023-24 JTA for HFDP supports ETF efforts. CDP certification supports TFBD efforts.	x				x	
	2	0	5	15	4	0

Plan Tally					
Goal 2			Goal 3		
a	b	c	a	b	c
		x			
			x		
			x		
			x		
			x		
			x		
x					
x					
	x				
			x		

x					
x					
x					
			x		
			x		
			x		
			x		
			x		
5	1	1	11	0	0



TRAINING AND EDUCATION COMMITTEE

REPORT TO THE PROFESSIONAL DEVELOPMENT SUBCOMMITTEE ASHRAE 2024 Annual Conference - Indianapolis

1. Action Item

Motion

To create a unified learning platform to support ASHRAE eLearning, instructor-led training, and self-directed learning offerings and enhance the user experience for ASHRAE members and the wider public.

Background

Currently, ASHRAE offers a rich array of educational resources across these three distinct categories. While the quality of content and instructor expertise are widely recognized, the committee believes there is room for improvement in the accessibility and user-friendliness of the training offerings. The existing system requires individuals interested in ASHRAE training to navigate multiple webpages, each dedicated to a specific training type. Furthermore, these trainings must be purchased separately based on their respective learning categories. This fragmented approach presents several challenges:

1. Inefficiency: Members and the public must spend unnecessary time navigating different pages to find the training they need.
2. Complexity: The current structure can be confusing, leading to missed opportunities for skill development for users and missed purchases for ASHRAE.
3. Frustration: Potential learners may be discouraged by the complexity of the process, resulting in lost opportunities for both ASHRAE and individuals seeking professional development.

To address these issues and provide a more user-centric learning experience, TEC proposes the creation of a unified ASHRAE learning platform. The platform would consolidate ASHRAE eLearning, instructor-led training, and self-directed learning into a single, user-friendly web-based platform. The new platform will replace the existing website pages members currently use to find and purchase the various types of training.

Key features and benefits of the proposed ASHRAE learning platform:

1. Centralized Access: Users can access all types of ASHRAE training from a single location, streamlining the process of finding relevant courses.
2. Seamless Registration and Purchase: Individuals can conveniently register for and purchase different types of training from a single source/provider, reducing administrative burdens and simplifying payments.
3. Personalized Learning Paths: The platform will allow users to create personalized learning paths, tracking their progress and recommending additional courses based on their interests and needs. ASHRAE can also provide learning paths for each of the ASHRAE Certifications, potentially increasing the use of learning courses and the applications for certifications.
4. Enhanced Search and Filter Functions: Robust search and filter options will make it easier for users to find the precise training they want. This includes being able to filter and search for learning materials that correspond to an ASHRAE Certification.

5. Feedback and Assessment: Interactive features will enable users to provide feedback and evaluate the quality of courses, contributing to ongoing improvement.
6. Community and Collaboration: The platform will also foster a sense of community and facilitate collaboration among ASHRAE members and learners.

The new single platform for training will allow ASHRAE to promote several types of training in a single location and encourage members and nonmembers to obtain the content in a format that matters to them. Increased use/purchase of courses and training may also encourage new courses and instructors, increasing the already rich ASHRAE training portfolio.

The TEC believes that the creation of this unified ASHRAE learning platform aligns with ASHRAE's mission to advance the arts and sciences of heating, ventilation, air conditioning, and refrigeration. Making ASHRAE educational resources more accessible and user-friendly will empower industry professionals and enthusiasts to effectively achieve their learning goals.

The Training and Education Committee kindly requests your approval and support to make this vision a reality, benefiting ASHRAE members and the broader HVAC&R community.

Fiscal Impact

The cost to implement the project one time cost of \$109,000 to build out the new unified learning website. There is project annual increase of \$40,000 for the hosting platform starting in year two. By streamlining and consolidating the hosting and check out process there is an expected increase in revenue and sales. Implementation would also result in a reduction in demands on ASHRAE staff.

2. Information Items

1. Ten ALI courses are scheduled with the 2024 ASHRAE Annual Conference. The combined registration total to date is 111, compared to 111 in 2023 (Tampa) and 76 in 2022 (Toronto). Combined course revenue is \$49,139 compared to \$149,030 in 2023 (Atlanta) and \$100,966 in 2022 (Vegas).
2. eLearning revenue through May 2024 has already surpassed the 2022-2023 fiscal year performance.
3. 1,776 individuals chose the eLearning membership benefit in July 2023- June 2024 compared to 2,334 in July 2022-June 2023.
4. The TEC completed the first year of the course reaffirmation process with approximately 20% of the existing ALI courses being reviewed and either reaffirmed, updated, or sunset if outdated and no longer implemented. The course catalog will continue to cycle through the reaffirmation process to ensure the ASHRAE education content is up to date and of a consistently high quality.
5. The TEC has selected Healthy Buildings as the next learning pathway and development of the pathway has shifted to ASHRAE staff.
6. New courses are being developed for building decarbonization in conjunction with CEBD. A new course on refrigerants will be developed at the request of the ASHRAE Board. Additional new content is being evaluated for development with a number of TCs.

Respectfully submitted,
Jesse Fisher, Training and Education Committee Chair
June 24, 2024

6-25-24

Report to Pub Council

Referencing AGT (ASHRAE Global Training) previously known as GTC (Global Training Center)

From Larry Fisher, Working Group within VOC (Volunteer Oversight Committee) of then GTC

Pub Chair – Billy Austin, Incoming Chair Ken Falk

VOC Chair – Chandra Sekhar, ASHRAE VP

The rebranded AGT developed a 5 year plan and budget for enhancing services for our global developing economies. Funding was requested from The Foundation for seed money for this rebranded project (\$40K for each of the next 3 years). Marketing developed a 5 year marketing plan with support from Development, GAC, and Society (Finance and Publishing).

The results are not good. Foundation felt the “ask” was not clearly understood and that AGT difference was in name only. Although it was a split vote (very close), the request failed.

In addition to Foundation, Society pulled an additional \$19K from the AGT budget, determining the savings will come from utilizing virtual training only (elimination of travel expenses).

Although the VOC 5 year plan was clear and concise that the will of individuals was to have in-person training, it was apparent that our plan was not read very well and most comments were related to the old GTC format.

At this point, Kirstin from Development is working on some funding from one of the recent inheritance (\$700,000) to hopefully keep AGT going, but actually I’m not sure what direction this is going.

Let us (me, Billy, Ken, Chandra) know if you have questions or comments. Thank you team for the many volunteer hours put in for this project. For me, I am sad, but at the end of the day I’m still Larry and will continue to do what I do. I feel bad for the developing countries engineers that could have benefited.
Thanks all, Larry

GOVERNMENT AFFAIRS COMMITTEE

Report to Pub-Ed Council
From Meeting of June 21, 2024
~ Annual Conference - Indianapolis, IN ~

1. Public Policy Priorities for Society Year 2024-25: The GAC unanimously approved the Public Policy Priorities (PPPs) for Society Year 2024-25. These PPPs were subsequently approved by ExCom and the Board of Directors.
2. Government Outreach Events (GOE): The GAC set a goal of 100 Government Outreach Events to be held during Society Year 2023-2024. As of June 18, a total of **129 GOEs** have been reported as being conducted in the 23-24 Society Year. These GOEs comprised 349 discrete meetings involving 375 ASHRAE members and 543 government officials.
3. Letters and Testimony: In SY23-24, Government Affairs has submitted **60 documents** (letters, testimony, and responses to Requests for Information and other regulatory proposals). To view those documents, you can visit [this website](#). Thank you for your contributions to these statements!
4. SMEs for GOEs Pilot Program: The GAC finalized details for its “Subject Matter Experts (SMEs) for Government Outreach Events (GOEs)” Pilot Program. This pilot program identifies and recruits Subject Matter Experts (SME) within ASHRAE who can communicate technical information effectively to government officials and policymakers. The program establishes a pool of SMEs with specific expertise who would be able to provide technical support and information for government briefings, legislative testimony, and/or responses to government requests for information. SMEs will be sources of technical support for local to global level government affairs work. We encourage applicants to this program, and the [online application can be found here](#).
5. Public Policy Issue Briefs (PPIBs): The GAC unanimously approved 11 PPIBs; 10 of which were existing PPIBs that were updated, and one of which was a new PPIB, entitled “Wildfires and Indoor Environmental Health,” which was subsequently approved by ExCom.

REPORT TO PUBLICATION AND EDUCATION COUNCIL
From the
Handbook Volume Realignment Ad Hoc Committee
As of June 7, 2024

John Constantinide- Chair
Megan Tosh
Nicholas Lemire
Scott Fisher

Recommendations for Council Approval:

The Handbook Volume Realignment Ad Hoc Committee has a recommendation offered in the attached spreadsheet. The table on the next page summarizes the recommendation.

Information Items:

The ASHRAE Handbook Volume Realignment Ad Hoc convened and discussed the best recommendation to the Publication and Education Council for the move of chapters between Handbook volumes. The current Handbook volumes deviate from the average page count of 1078 pages by 396 pages, with the HVAC Applications Handbook, and 300 pages, with the Refrigeration Handbook. The recommended changes will reduce deviations from the average page count across all Handbooks to no more than 4 pages. Along with moving content to appropriate volumes, the recommendation to reduce volume deviation from the average page count will stabilize Staff and printing costs across publication years. The split of the Refrigeration Handbook into two parts and equalizing page count provides a path forward for growth in all Handbooks without incurring cost fluctuations on ASHRAE.

Date

John Constantinide
Chair

Summary of Handbook Changes

<u>Handbook Title</u>	<u>Current Page Count</u>	<u>Proposed Page Count</u>	<u>Notes</u>
Handbook 2025 FUNDAMENTALS	1113	1082	New title: Handbook 2026 REFRIGERATION (Part 1) and BUILDINGS OPERATIONS AND MANAGEMENT (Part 2)
Handbook 2026 REFRIGERATION	779	1081	
Handbook 2027 HVAC APPLICATION	1474	1075	
Handbook 2028 HVAC SYSTEMS AND EQUIPMENT	947	1075	

Summary of Handbook Changes

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Handbook 2025 FUNDAMENTALS	1113	1082
Handbook 2026 REFRIGERATION	779	1081
Handbook 2027 HVAC APPLICATION	1474	1075
Handbook 2028 HVAC SYSTEMS AND EQUIPMENT	947	1075

Notes

New title: Handbook 2026 REFRIGERATION (Part 1) and BUILDINGS OPERATIONS AND MANAGEMENT (Part 2)



Center of Excellence for Building Decarbonization (CEBD) & PubEd Council

Blake Ellis
June 25, 2024

Why Was the CEBD Formed?

- ASHRAE's Task Force for Building Decarbonization (TFBD) was a series of one (1) year appointments by the ASHRAE President
- One of the tasks given to the TFBD was to determine how to integrate its activities within the ASHRAE organization
- On July 1, 2024, the CEBD will replace the TFBD



CEBD Primary Responsibilities

- **Strategy**
Provide strategic direction for ASHRAE building decarbonization activities
- **Thought Leadership**
Monitor future issues and trends and publicize ASHRAE's decarbonization work globally to establish ASHRAE's leadership position
- **Collaboration**
Coordinate joint initiatives, events, and projects with other U.S. and international organizations whose work is complementary to ASHRAE's building decarbonization activities
- **Public Advocacy**
Work with Government Affairs to provide reliable technical information on decarbonization to policymakers, media, and the public



What about the other activities and functions that the Task Force for Building Decarbonization was doing?



CEBD Supporting Activities

- Operational Activities are led by other groups within ASHRAE
- The CEBD has a supporting role in these activities
- Sample Operational Activities:
 - Technical Resources
 - Technical Review
 - Standards Coordination
 - Training Development
 - Resource Internationalization
 - Member Engagement
 - Development



CEBD Membership

Members

- Kent Peterson, Chair
- Blake Ellis, Vice Chair
- Ghina Annan
- Carrie Brown
- Luke Leung
- Bing Liu
- Clay Nesler
- Rajan Rajendran
- Ginger Scoggins

Liaisons

- Kayleigh Houde, MEP 2040
- Bill McQuade, Members Council
- **Jeremy Smith, PubEd Council**
- Costa Balaras, Tech Council
- Stephanie Reiniche, Staff Liaison



CEBD Organizational Chart



Center of Excellence for
Building Decarbonization

BOD

BOD ExCom

**Center of Excellence
for Building
Decarbonization
(CEBD)**

Members Council

**Publishing &
Education Council**

Technology Council

**Committees Reporting to
Publishing & Education
Council**

Special Projects

**Special Project Decarbonization
Groups (SPDG)**

As of July 1, 2024



What Does CEBD Need From the Councils?

- Technical Resources
 - Expedite the delivery of technical resources that help design engineers and other industry professionals deliver and operate low-carbon buildings. Develop additional technical resources, system design, and operations guides for building decarbonization.
- Technical Review
 - Review technical content related to building decarbonization submitted to ASHRAE for comment and approval.
- Standards Coordination
 - Coordinating ASHRAE and other industry standards to ensure consistency in decarbonization-related terminology, definitions, and guidance.
- Training Development
 - Develop on-demand and in-person building decarbonization-related training seminar materials for society and chapter-level audiences.
- Resource Internationalization
 - Tailor existing technical resources and training materials for application outside of North America.
- Member Engagement
 - Encourage ASHRAE membership to embrace decarbonization-related practices and provide appropriate opportunities for volunteer engagement.
- Development
 - Work with the Development Committee to help secure funding from industry partners, foundations, governments, and other external sources for the CEBD's activities.

Each of these activities are “projects” to be completed



Current Project List

- Guides (*Blake Ellis led w/ Working Group Chairs*)
 - Decarbonizing Hospital Buildings
 - Building Decarbonization Retrofits for Commercial and Multifamily Buildings
 - TM65 Addendum for North America
 - Whole Life Carbon Guide for Building Systems
 - Decarbonizing Building Thermal Systems: A Guide for Applying Heat Pumps and Beyond (*Expanded*)
- Guide Training (*Blake Ellis & Hailey Mick co-led*)
 - Grid-Interactive Buildings for Decarbonization: Design and Operation Resource Guide
 - Decarbonizing Hospital Buildings
 - Building Decarbonization Retrofits for Commercial and Multifamily Buildings
 - Decarbonizing Building Thermal Systems: A Guide for Applying Heat Pumps and Beyond
 - TM65 Addendum for North America
 - Whole Life Carbon Guide for Building Systems
- ALI Course
 - How to Apply Whole Life Decarbonization Strategies to New Buildings Design



Future Project List

- Refrigerant Emissions Management, Tracking and Compliance
- Harmonizing Global Decarbonization Standards for Streamlined Compliance
- Streamlined, Flexible International Building Code Framework
- Evaluating global ASHRAE Member and Industry Needs for Building Decarbonization Education
- Optimizing PCR Protocols for Enhanced EPD Precision in HVAC&R Manufacturing
- Update HVAC Equipment Service Life Data
- Standardizing Whole Life Carbon Calculations for Building Systems
- Whole-Life Carbon Options Tool
- Strategic Assessment of Embodied and Operational Carbon Trade-Offs
- Updating Heat Pump Testing Requirements
- A1-A3 Foundational Embodied Carbon Quantification for MEP Systems
- Heat Pump Sizing Guide: Enhanced for Defrost Efficiency and Decarbonization
- Decarbonization Framework for Data Centers
- Decarbonizing District Energy Systems Guide
- Decarbonizing Single-Family Homes: A Guide for Sustainable Retrofits
- Building Circular Economy Practices for GHG Reduction
- Expanding Decarbonization to Unconventional GHG Emission Sources
- Decarbonization Strategies for Supermarket Industry Archetypes



Ideas to Leverage Success for the Councils

- Need Champions!
 - Accomplishing goals and meeting faster deadlines requires a champion that is passionate about the project.
- Need Assistance
 - Make a “Call for Members” for people wanting to help with Decarbonization that could be plugged into DTGs or other groups overseeing projects.
- Need Good Leadership in the Councils.
- Alignment with the Strategic Plan
- Having funding to support the projects (Money in the CEBD budget passed to Councils to complete projects).
- Need a Jump Start Package that includes the scope, schedule, and budget for the project.



Sample of Items Discussed in CEBD Strategic Planning

- Education & Training
 - 10 target audiences identified
 - 7 delivery methods
 - Development methodology discussion
 - 21 potential topics

How Does PubEd Council Want to Organize?

- Discussion

**REPORT TO THE BOARD OF DIRECTORS
From the Publishing and Education Council (PEC)
As of June 26, 2024**

Recommendations for Board Approval:

1. **Motion:** PEC recommends the BOD approve changes to the Publications Committee's section of the ASHRAE Rules of the Board (ROB) as shown below:

2.419 PUBLICATIONS COMMITTEE

2.419.001 SCOPE AND PURPOSE

This committee identifies the technical information needs of the HVAC&R industry not met through the ASHRAE Handbook series, ASHRAE's research journal, standards, guidelines, or user's manuals and oversees editorial policies and delivery of products to the marketplace. This committee also determines the best paper published in the volume year of *ASHRAE Journal* preceding the ASHRAE Winter Conference.

2.419.002 MEMBERSHIP

2.419.002.1 Composition

The members of this committee are as follows:

- A. Twelve (12) voting members, including a chair and a vice chair. (16-06-29-20)
- B. Non-voting members include a Board ex officio member and coordinating officer.

2.419.002.2 Qualifications

- A. All members of the committee shall hold the grade of Associate Member or higher in the Society.
- B. Members should have an awareness of the current technical information needs of various segments of the HVAC&R industry.
- C. Membership should include broad representation from the HVAC&R industry including the academic, design, construction, facility operations and manufacturing communities.
- D. At least three members should have recent experience with the production or writing of technical publications or periodicals.

2.419.002.3 Term of Service

The term of service for voting members is intended to be three (3) years.

2.419.003 OPERATION

2.419.003.1 General Requirements

- A. This committee shall oversee the editorial policies of ASHRAE's Special Publications, *ASHRAE Transactions* and other conference proceedings, *ASHRAE Journal*, and ASHRAE's electronic newsletters. The committee shall be subject to these conditions:

1. The data recommended for publication shall tend toward the professional education of the individual engineer;
 2. Such data shall be free from commercial bias;
 3. Such data shall tend to advance for the public benefit the arts and sciences relating to heating, refrigeration, air conditioning, and ventilation and the allied arts and sciences.
- (67-06-25-08/82-06-30-25/86-06-22-18M)

- B. ASHRAE shall produce Special Publications that shall be defined as all technical publications in print format (except for the ASHRAE Handbook series; standards, guidelines, and user's manuals; ASHRAE's research journal, and ASHRAE's magazines), such as ~~non-series~~ books (including books resulting from ASHRAE Research Projects and Special Projects), ~~books in the Advanced Energy Design Guide series and the ASHRAE Datacom Series~~, charts, and tools, as well as all technical publications in machine-readable format, such as audio and visual presentations, software, databases, apps, and online resources. These special publications may be generated from proposals submitted directly to Publications Committee or from accepted Publication Topic Acceptance Requests (PTARs), which Publications Committee reviews before providing recommendations to Research Administration Committee (RAC) for the final vote regarding funding. This committee shall also communicate with the cognizant TCs of existing ASHRAE publications to help staff determine whether older publications are up to date as is, need to be revised, or need to be removed from sale.
- C. The objective of *ASHRAE Transactions* shall be to serve as the archival publication of unsolicited research papers and Society-sponsored research and discussions in HVAC&R technical areas presented at the ASHRAE Annual and Winter Conferences as well as of Society business such as council and committee membership and award recognition. The objective of proceedings of ASHRAE-sponsored conferences and ASHRAE cosponsored conferences shall be to serve as the archival publications of the unsolicited research papers presented at these conferences.
- D. The objective of *ASHRAE Journal* shall be to lead in communication of heating, ventilating, air-conditioning and refrigeration information to and from the profession, industry, and related interests. (ROB 520-144-007). Editorial and advertising content of *ASHRAE Journal* shall be directed toward the professional education of persons engaged in industries related to heating, ventilating, air conditioning, and refrigeration. (86-06-22-18L). This committee shall determine the annual winner of the Journal Paper Award.
- E. The objective of ASHRAE's electronic newsletters shall be to communicate news to various audiences. *Insights*, distributed to members only, includes news of members, chapters, regions, Society committees, and International Associates. (ROB 520-144-007; 86-06-22-18L) *ASHRAE Journal Newsletter*, distributed to members only, connects news of industry trends with articles from *ASHRAE Journal's* archive of peer-reviewed content. *ASHRAE HVAC&R Industry News* curates the latest trends and announcements from the industry to a large readership of members and non-members. *HPB Newsletter* combines online HPB articles and *ASHRAE Journal* articles with links to external articles related to energy efficiency, resiliency and sustainability for a diverse audience of ASHRAE engineers, architects, facilities managers and building owners.

2.419.004 STRATEGIC PLAN

(09-06-21-12C)

This committee shall develop procedures for recommending updates to the strategic plan on a continuous basis. As a minimum the committee shall submit a report to the council prior to the Annual Meeting. The report includes the current status of each activity which supports the fulfillment of the committee's assignments under the strategic plan. The committee shall report to the council all recommendations for changes to the strategic plan as provided by the committee's constituents prior to the Annual Meeting.

Background: These changes reflect the need to include mention of the annual Journal Paper Award and to include another missing member task (communicating with the TC leadership), as well as a minor editorial change to the listing of Special Publications.

Fiscal Impact: None.

Staff Impact: No changes.

2. **Motion:** To create a unified learning platform to support ASHRAE eLearning, instructor-led training, and self-directed learning offerings and enhance the user experience for ASHRAE members and the wider public, funded by the General Reserve Fund.

Background: Currently, ASHRAE offers a rich array of educational resources across these three distinct categories. While the quality of content and instructor expertise are widely recognized, the committee believes there is room for improvement in the accessibility and user-friendliness of the training offerings.

The existing system requires individuals interested in ASHRAE training to navigate multiple webpages, each dedicated to a specific training type. Furthermore, these trainings must be purchased separately based on their respective learning categories. This fragmented approach presents several challenges:

1. Inefficiency: Members and the public must spend unnecessary time navigating different pages to find the training they need.
2. Complexity: The current structure can be confusing, leading to missed opportunities for skill development for users and missed purchases for ASHRAE.
3. Frustration: Potential learners may be discouraged by the complexity of the process, resulting in lost opportunities for both ASHRAE and individuals seeking professional development. Feedback from the CRCs roundtable is that guidance is needed in how to navigate through ASHRAE's technical resources and educational offerings.

To address these issues and provide a more user-centric learning experience, the Training and Education Committee (TEC) proposes the creation of a unified ASHRAE learning platform. The platform would consolidate ASHRAE eLearning, instructor-led training, and self-directed learning into a single, user-friendly web-based platform. The new platform will replace the existing website pages members currently use to find and purchase the various types of training.

Key features and benefits of the proposed ASHRAE learning platform:

1. Centralized Access: Users can access all types of ASHRAE training from a single location, streamlining the process of finding relevant courses.
2. Seamless Registration and Purchase: Individuals can conveniently register for and purchase different types of training from a single source/provider, reducing administrative burdens and simplifying payments.
3. Personalized Learning Paths: The platform will allow users to create personalized learning paths, tracking their progress and recommending additional courses based on their interests and needs. ASHRAE can also provide learning paths for each of the ASHRAE Certifications, potentially increasing the use of learning courses and the applications for certifications.
4. Enhanced Search and Filter Functions: Robust search and filter options will make it easier for users to find the precise training they want. This includes being able to filter and search for learning materials that correspond to an ASHRAE Certification.
5. Feedback and Assessment: Interactive features will enable users to provide feedback and evaluate the quality of courses, contributing to ongoing improvement.
6. Community and Collaboration: The platform will also foster a sense of community and facilitate collaboration among ASHRAE members and learners.

The new single platform for training will allow ASHRAE to promote several types of training in a single location

and encourage members and nonmembers to obtain the content in a format that matters to them. Increased use/purchase of courses and training may also encourage new courses and instructors, increasing the already rich ASHRAE training portfolio.

TEC believes that the creation of this unified ASHRAE learning platform aligns with ASHRAE's mission to advance the arts and sciences of heating, ventilation, air conditioning, and refrigeration. Making ASHRAE educational resources more accessible and user-friendly will empower industry professionals and enthusiasts to effectively achieve their learning goals.

TEC kindly requests your approval and support to make this vision a reality, benefiting ASHRAE members and the broader HVAC&R community.

Thank you for considering this proposal. We look forward to discussing this initiative further and working together to improve ASHRAE's training offerings.

Fiscal Impact: The cost to implement the project is a one-time cost of \$109,000 to build out the new unified learning website. There is projected annual increase of \$40,000 for the hosting platform starting in year two. By streamlining and consolidating the hosting and check out process there is an expected increase in revenue and sales. Implementation would also result in a reduction in demands on ASHRAE staff.

Expected Benefits

- An increase is expected in revenue from a streamlined offering that simplifies the navigation of offerings and the checkout process. Any specific numbers are conjecture but we do believe that the increased revenue will more than offset the increased cost.
- Currently collection of data on sales and users is difficult to correlate and use. A unified platform would allow for better data collection and more targeted marketing to drive additional sales.
- A considerable amount of staff time will be saved through automation on the new platform. The estimated savings are \$20,000 annually in staff time after implementation and an additional 500 hours per year available for staff to spend on other priorities and projects that are currently not getting the attention they deserve.

(Professional Development Subcommittee approved unanimously, 9-0-0, CV; Fiscal Subcommittee approved unanimously, 9-0-0, CV)

Information Items:

1. ASHRAE Certification received a record **700+** applications in 2023-24, which is a **45% increase** over the 2022-23 near record total of 482 applications.
2. ASHRAE Certification received over 100 applications for **Decarbonization Professional Certification** the since March 1, 2024. The first Certified Decarbonization Professional ([CDP](#)) certification exams will be administered June 25, 2024.
3. ASHRAE Certification reports that through May 31, 2024, **over 1,100 study guides** have either been sold or selected as a renewing full Member benefit.

- [*Certification Study Guide: Certified HVAC Designer \(CHD\)*](#)
- [*Certification Study Guide: Building Commissioning Professional \(BCxP\)*](#)
- [*Certification Study Guide: Building Energy Modeling Professional \(BEMP\)*](#)

June 25, 2024

Billy Austin

Date

Chair