

ASHRAE CE IEQ STRATEGIC PLANNING RETREAT

Meeting Summary for April 23–24, 2026 • Washington, D.C. (Hybrid)

ASHRAE Center of Excellence for Indoor Environmental Quality

Thursday, April 23, 2026 1PM-6:30PM

ASHRAE Gov Affairs Office

Topic	Lead
<p>Welcome & Review of Objectives</p> <ul style="list-style-type: none"> Welcome & introductions - ASHRAE Values Statement Meeting logistics Meeting objectives and agenda 	Wade/Marwa
<p>Review Activities (Completed & Ongoing)</p> <ul style="list-style-type: none"> HLT/CE IEQ Update ROB update, MOP review and vote (Wade) ~10 min RFP update (Corey) Ref Manual update (Stephanie) 	Various
<p>Alignment between CE IEQ and Other Committees, Councils and Liaisons</p> <ul style="list-style-type: none"> EHC - IEQ Conference path forward Expectation of Liaisons Level of involvement and meeting cadence Division of priorities and responsibilities Cross-over and gaps/opportunities Current requests for engagement (ARPA-H BREATHE, National Academies) 	Wade/Marwa
<p>Breakout Session Overview</p> <ul style="list-style-type: none"> Overview of breakout session structure and expectations. Goal: develop a prioritized list of actions the CE IEQ should take in 2026–27 and beyond. 	Marwa
<p>Society-level Roadmap Document for Advocacy/Briefings and Marketing Plan</p> <p>Breakout Session A (parallel sessions)</p> <p>A.1 – CE IEQ Roadmap Priority Topic: Society-level Harmonization Strategy Commitments (guidance memo, checklists, templates, etc.)</p>	<p>Marwa</p> <p>Lead: Bill Bahnfleth Megan Tosh, Erik Miller-Klein, Matthew Archey, Stephanie Reiniche, Mark Jackson John McKeon (Remote)</p>
<p>A.2 – CE IEQ Roadmap Priority Topic: External Coordinated Health/IEQ/IAQ Nexus Commitments (Decarbonization, Energy)</p>	<p>Lead: Corey Metzger Hailey Mick, Hassan Younes, Meghan McNulty, Wade Conlan, Leigh Lain Walker Adrienne Thomle (Remote)</p>
<p>A.3 – CE IEQ Roadmap Priority Topic: Marketing plan</p>	<p>Lead: Robert Bean Amr Suliman, Jason Hartke (suggested), Don Weekes, Marwa Zaatari. Alice Yates Bill McQuade (Remote)</p>
<p>Potential Liaisons and Partner Organizations Internal and External Advocacy and Collaborations</p>	Wade

Thursday, April 23, 2026 Meeting Summary

Day 1 Meeting - Overview

The CE IEQ convened a strategic working session to review completed and ongoing activities, clarify alignment with internal committees and councils, assess external engagement and liaison requests, and establish priorities for Society Year (SY) 2026–27. The meeting reinforced CE IEQ's evolving role as ASHRAE's strategic, outward-facing leader on IEQ, with a strong emphasis on harmonization, policy influence, and external coordination. The meeting confirmed CE IEQ's transition into a **strategic, outward-facing leadership role** for IEQ across ASHRAE—focused on harmonization, policy influence, external partnerships, and long-range prioritization—while strengthening alignment with crucial ASHRAE committees such as EHC, GAC, CEBD, as well as key external stakeholders.

Governance and Organizational Matters

The CE IEQ confirmed successful establishment of its governance foundations:

- The **Rules of the Board (ROB)** have been approved by the ASHRAE Board of Directors.
- The **Manual of Procedures (MOP)** was reviewed and unanimously approved; 8-0-0, CV.

The committee agreed that the MOP appropriately establishes CE IEQ's operating framework. Targeted clarifications rather than structural revisions are needed, particularly related to member qualifications, liaison expectations, and coordination with key committees. These updates will be addressed through the Reference Manual.

IEQ Standards and Technical Initiatives

The CE IEQ was updated on the progress of the **IEQ Standard RFP seed document**, which is ready for review and will be posted for input. The document is intended to seed development of an IEQ standard that complements existing ASHRAE standards, particularly by addressing operational performance and outcomes not fully covered today. The committee discussed the relationship to Standards such as 189.1 and reinforced that CE IEQ's intent is not duplication, but thoughtful integration and gap-filling. Broad feedback from CE IEQ will inform next steps, with a proposed six-month development window.

Alignment with Environmental Health Committee (EHC)

A key outcome of the meeting was formal clarity on the functional alignment between CE IEQ and the EHC:

- **CE IEQ** will lead on *IEQ strategy, prioritization, harmonization across the Society, external coordination, and long-term IEQ Roadmap*.
- **EHC** will continue to lead *technical execution*, including development of the trends and gaps report, policy and position document development, handbook content for Environmental Health chapter, ASHRAE Journal IAQ column, conference programming along with CEC, review RTARS, communicate policy and interface 241 and position documents as coordinated with Technology Council, and administer the EHC Award.

CE IEQ will also support EHC in long-range planning for future IEQ conferences and will provide prioritized topic areas following completion of CE IEQ's strategic planning process.

Government Affairs and Policy Engagement

The Council discussed enhanced coordination with the **Government Affairs Committee (GAC)**, emphasizing the importance of alignment across CE IEQ, EHC, and GAC.

Key themes included:

- A triangular working relationship in which CE IEQ provides strategic and outward-facing leadership, EHC provides technical depth, and GAC provides legislative and policy insight.
- A focus on scalable approaches such as **model policies and legislation**, rather than jurisdiction-by-jurisdiction advocacy.
- The need to formalize coordination practices and liaison expectations within CE IEQ governance documentation.

External Engagements and Strategic Partnerships

The Council reviewed several external engagement opportunities and discussed the need to set parameters for vetting collaborations and guest speakers in CE IEQ meetings, with particular discussion on:

- **National Academies Health & Buildings Roundtable** participation, which was viewed as strategically valuable for influence, thought leadership, and cross-sector collaboration.

- **ARPA-H's BREATHE Program**
- Agreement to pursue modest, targeted participation (e.g., limited travel support) rather than formal sponsorship, while ensuring that insights from these engagements are translated back to the ASHRAE community.

The Council also recognized a growing volume of external liaison and partnership requests and agreed on the need for clearer evaluation criteria tied to CE IEQ's strategic priorities, scope, and long-term obligations.

Liaison Strategy

The Council reviewed and narrowed a list of potential liaison organizations and discussed the distinction between **formal liaisons** and more limited, ad hoc engagements. Final liaison selections were scheduled for completion immediately following the meeting, with the intent to limit total commitments, avoid duplication with existing Society liaisons, and retain flexibility for future needs.

The meeting confirmed CE IEQ's trajectory in SY 2026–27 as a **strategic integrator and external-facing leader** for IEQ across ASHRAE. The actions set from this meeting will position CE IEQ to more effectively elevate IEQ within ASHRAE and across the broader built environment community.

Action Items & Next Steps:

- Discuss Breakout Session action priorities to help inform CE IEQ Roadmap development.
- Collect CE IEQ feedback on the IEQ Standard RFP seed document (Deadline: April 30). Leigh Lain Walker to distribute the document link.
- Clarify external engagement and liaison strategy – build out member and liaison job description.
- Update the CE IEQ Reference Manual with targeted clarifications (member qualifications, committee coordination, liaison expectations). Target timeline is 6 months completion before Winter Conference.
- Provide prioritized IEQ topics to EHC for future conference planning.
- Share CE IEQ strategic goals with GAC and formalize coordination practices.
- Finalize liaison selections and document expectations.

Friday, April 24, 2026 8AM-11:30PM

Daikin Sustainability and Innovation Center (DSIC)

Topic	Lead
Arrival and Breakfast	
Thursday recap and Friday Agenda <ul style="list-style-type: none"> • Summary of key themes and discussions. • Review agenda. Breakout Session Discussion Prep <ul style="list-style-type: none"> • Equal time for all sessions • Develop a list of actions the CE IEQ could take. 	
Breakout Session Summaries (~10 min each) <ul style="list-style-type: none"> • Session A: A.1, A.2, A.3, — Session leaders present. 	<i>Session Leaders</i>
<ul style="list-style-type: none"> • CEBD Update ~20 min • Alignment between CEBD and CE IEQ 	<i>Blake/Carrie Marwa/Wade Stephanie</i>
Prioritization of CE IEQ Activities <ul style="list-style-type: none"> • Review the full action list generated across all sessions. • Add any missing items. • Voting & prioritization: results will drive CE IEQ actions for 2026–27 and beyond. 	<i>Marwa</i>
Closing Reflections and Wrap Up <ul style="list-style-type: none"> • Lessons learned from outgoing members (~5 min each). 	<i>Outgoing Members/Marwa</i>
Daikin Tour and co-ASHRAE Centers of Excellence Luncheon	

Friday, April 24, 2026 Meeting Summary

Day 2 Meeting - Breakout Session Strategic Priority Outcomes:

1. **Develop IEQ Operator Checklist and Standards-Specific Guidance (4 tasks by Annual Meeting 2027)**
 - a. Working Group: Erik (lead), Hailey, Meghan, Robert, Chris
2. **Develop a Holistic IEQ Briefing Document (4 tasks by Winer Meeting 2027)**
 - a. Working Group: John (lead), BillB, Wade, MeganT, Amr, Hailey
3. **Develop Metrics for IEQ and Carbon, Energy Nexus (3 tasks within 2 years)**
 - a. Working Group: Hassan (lead), Don, BillB, Corey, Marwa, CarrieB (CEBD), Hailey
4. **Review and Strengthen Organizational Relationships (3 tasks within 6 months).**
 - a. Working Group: Marwa (lead), Wade, Alice, Stephanie
5. **Announce and Activate CE IEQ (4 short-term tasks).**
 - a. Working Group: Wade (lead) BillM, et al.

Priority Liaison Outcomes:

Formal Liaisons to extend an invitation to attend meeting and have a voice in CE IEQ discussion, pending assignment acceptance:

- International Facility Management Association
- Health & Human Services / MAHA
- American Institute of Architects
- Illuminating Engineering Society
- International WELL Building Institute (IWBI)

Discussed opportunities for all other informal relationships and cross-CE IEQ interdisciplinary cohorts that can be engaged through regular updates on CE IEQ activities and strengthened through staff-to-staff communication. Suggestions included building relationships with IAQ colleagues, supporting IEQ-related conferences outside of ASHRAE expertise, and tapping into staff-to-staff relationships for ongoing communication, as well as helping with fundraising with Development and CEC.

The day ended with closing reflections and lessons learned from Outgoing HLT Members. Marwa wrapped up with an overview of the priorities discussed and a co-ASHRAE Centers of Excellence Luncheon.

ASHRAE CE IEQ Membership & Attendees

	ASHRAE CE IEQ Attendees	Role/Title
1	Wade Conlan	CE IEQ Chair/Incoming Coordinating Officer (Treasurer) SY 26-27
2	Marwa Zaatari	CE IEQ Vice Chair/Incoming CE IEQ Chair SY26-27
3	Amr Suliman	CE IEQ Member Y26
4	Don Weekes (Remote)	CE IEQ Member Y26
5	William "Bill" Bahnfleth	CE IEQ Member Y26-29
6	Erik Miller-Klein	CE IEQ Member Y26-29
7	Robert Bean	CE IEQ Member Y26-29
8	John McKeon (Remote)	CE IEQ Member Y26-29
9	Hailey Mick	CE IEQ Member Y26-29
10	Meghan McNulty	CE IEQ Member Y26-29
11	Hassan Younes	CE IEQ Member Y26-29
12	Matthew Archey	Members Council Liaison to CE IEQ Y26
13	Megan Tosh	PubEd Council Liaison to CE IEQ Y26
14	Corey Metzger	Tech Council Liaison to CE IEQ Y26/Incoming Consultant SY 26-27
15	Adrienne Thomle (Remote)	Incoming Tech Council Liaison to CE IEQ SY 26-27
16	Jason Hartke	International WELL Building Institute Liaison to CE IEQ SY 26-27
17	Stephanie Reiniche	Staff Liaison, ASHRAE Director of Technology
18	Leigh Lain Walker	Staff Liaison, ASHRAE Mgr. of Building Decarbonization
	Guests	Role
19	Alice Yates	ASHRAE Managing Dir. of Government Affairs
20	Mark C. Jackson	IEQ SME Daikin Applied Americas
21	Ivan Rydkin	Daikin Dir. Regulatory and Industry Affairs
22	Blake Ellis	CEBD Chair (incoming ASHRAE Vice President SY 26-27)
23	Carrie Brown	CEBD Vice Chair (incoming CEBD Chair SY 26-27)
24	Ginger Scoggins	CEBD Member (incoming CEBD Vice Chair SY 26-27)
25	Mark Lessans	CEBD Member
26	Amanda Webb	CEBD Member
27	Mark Lessans	CEBD Member
28	Stet Sanborn	CEBD Member
	Absent	
	Bill McQuade	ASHRAE President SY 25-26/Incoming CE IEQ Vice Chair SY 26-27
	Robert "Bob" Bowcock	CE IEQ Member Y26
	Ashish Rakheja	Coordinating Officer (Treasurer) Y26
	Chris Wolgamott	CE IEQ Member Y26-29