

2026 CE IEQ Strategic Planning Retreat

April 23-24, 2026



Thursday April 23, 2026



Welcome and Review Objectives



Welcome & Introductions

ASHRAE Values Statement

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.



Welcome & Introductions

Introductions

- Name
- Company
- CE IEQ Role
- What is your favorite quote? (Person and Quote – no other context)



Agenda – Thursday, April 23, 2026

Time	Topic	Lead
12:00 PM	Box Lunch	
1:00 – 1:30 PM	Welcome & Review of Objectives <ul style="list-style-type: none"> Welcome & introductions Meeting logistics Meeting objectives and agenda 	Wade/Marwa
1:30 – 2:15 PM	Review Activities (Completed & Ongoing) <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
2:15 – 3:05 PM	Alignment between CE IEQ and Other Committees, Councils and Liaisons <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
3:05 – 3:15 PM	Breakout Session Overview <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
3:15 – 3:30 PM	Break	



Agenda – Thursday, April 23, 2026

Time	Topic	Lead
3:40 – 5:10 PM	Society-level Roadmap Document for Advocacy/Briefings and Marketing Plan - Breakout Session A (parallel sessions)	Marwa
	A.1 – CE IEQ Roadmap Priority Topic: Society-level Harmonization Strategy Commitments (guidance memo, checklists, templates, etc.)	Lead: Bill Bahnfleth Megan Tosh, Erik Miller-Klein, Matthew Archey, Stephanie Reiniche, Mark Jackson, John McKeon (Remote)
	A.2 – CE IEQ Roadmap Priority Topic: External Coordinated Health/IEQ/IAQ Nexus Commitments (Decarbonization, Energy)	Lead: Corey Metzger Hailey Mick, Hassan Younes, Meghan McNulty, Wade Conlan, Leigh Lain Walker, Adrienne Thomle (Remote)
	A.3 – CE IEQ Roadmap Priority Topic: Marketing plan	Lead: Robert Bean Amr Suliman, Jason Hartke (suggested), Don Weekes, Marwa Zaatari. Alice Yates, Bill McQuade (Remote)
5:10 – 5:20 PM	Break	
5:20 – 5:40 PM	Potential Liaisons and Partner Organizations Internal and External Advocacy and Collaborations	Wade
5:40 – 6:00 PM	Thursday Wrap Up <ul style="list-style-type: none"> • Key takeaways from breakout sessions. • Anything to add to Saturday’s agenda? • Review logistics for Thursday evening and Friday morning. • 6:30 PM Dinner: Circa at Foggy Bottom - 2221 I St NW 	Wade



Review of the Agenda

1. Welcome, Introductions & Meeting Logistics
2. Review Activities Completed & Ongoing
3. Alignment between CE IEQ and Other Committees/Councils/Liaisons
4. Strategic Breakout Sessions
5. Potential Liaisons and Partner Organization
6. Breakout Session Summaries & Discussion
7. CEBD Update and Alignment between CEBD and CE IEQ
8. Prioritization of our SY 2026-27 activities
9. Discuss resources needed (*if time available*)
10. Closing activities (lessons learned, action item review, etc.)



Review CE IEQ Scope and Purpose

CE IEQ Scope & Purpose

- **Strategy.** Provide strategic direction for ASHRAE IEQ activities. Develop and prioritize strategic initiatives that accelerate and advance IEQ on a global basis.
- **Thought Leadership.** Monitor emerging issues and trends to ensure that ASHRAE remains relevant and the forefront leader in IEQ.
- **Collaboration.** Coordinate joint initiatives, events, and projects with organizations whose work is complementary to accelerate and advance building IEQ.
- **Public Policy, Advocacy and Outreach.** Work with Government Affairs and outside organizations to provide reliable technical information on IEQ to policymakers, media, and the public. Develop policy and outreach programs to address major IEQ issues through initiatives and programs being proactive and not reactive.



Review CE IEQ Activities (Completed and Ongoing)

- HLT/CE IEQ Update
- ROB Update, [MOP review](#) and vote
- RFP Update
- Ref Manual Update

HLT/ CE IEQ Update

- IEQ CE was formed and renamed to CE IEQ 1 month later
- Committee formed in February until June 30, 2026
- Next committee via Appointments (thanks for accepting)
- 3 In Person Meetings
 - Annual, Winter, Spring Strategic Meeting
- Biweekly Committee Virtual Meetings



Organizational Structure

The structure will mirror the CEBD structure and report to Board ExCom.

Voting Members:

- Chair and Vice Chair
- Two voting members outside of the US and Canada.
- Two voting representatives from major stake holder organizations or a public health officials with IEQ expertise outside of ASHRAE's core scope.
- A past Chair of the Environmental Health Committee.
- A current member of the Environmental Health Committee.

Liaisons:

- One from each Council
- One from CEBD
- Additional outside organizations

Priorities Identified

- ❖ Develop an IEQ Roadmap – Society level that frames IEQ priorities, milestones and advocacy messaging.
- ❖ Expedite the development of a health-based IEQ Standard.
- ❖ Harmonize IEQ across the Society.
- ❖ Align IEQ CE and CEBD.
- ❖ Facilitate and expedite (develop) education Resources.
- ❖ Assisting and coordination of IEQ Activities



Year-1 Success Indicators

- ✓ Expedited IEQ Standard
- ✓ IEQ Roadmap with one-pager
- ✓ Harmonization guidance adopted
- ✓ IEQ Level I Course launched; Level II in development.



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Alignment between CE IEQ and Other Committees, Councils and Liaisons

- EHC - IEQ Conference path forward
- Level of involvement and meeting cadence
- Expectation of Liaisons
- Division of priorities and responsibilities
- Cross-over and gaps/opportunities
- Current requests for engagement

EHC – IEQ Conference Path Forward

Role: *Assist EHC in Long Range planning for the IEQ Conference*

- Long Range: Next 3 Conferences, EHC provides to CE IEQ
 - Year
 - Potential Month
 - Potential Chair
- Short Range: Next Conference, EHC provides to CE IEQ
 - Actual Dates for Conference
 - Location
 - Chair / Vice Chair and Tech Chair
 - Potential Theme / Tracks
 - Completed form submitted to CEC

CE IEQ to provide EHC its prioritized ideas after Strategic Mtg



EHC – IEQ Alignment (as presented to BOD)

Items to transfer from EHC to the CE IEQ

1. Develop strategic plan
2. Recommend new activities (such as product development, future challenges, etc.)
3. Recommend policy documents for ASHRAE to create on IEQ
4. Identify potential topics for new position documents
5. Prioritize IEQ research topics
6. Facilitate the expediting of education resources, review courses, and choice of topic
7. Oversee harmonization of IEQ across society
8. Provide external coordination with outside organizations and relationship maintenance
9. Assist EHC in the long-range plan for IEQ conferences



EHC – IEQ Alignment (as presented to BOD)

Items that are staying with EHC

1. Develop the trends and gaps report (will feed into the strategic plan)
2. Develop policy documents they deem necessary and as suggested by the CE IEQ
3. Develop position documents
4. Manage ASHRAE Journal IAQ Column
5. Maintain Handbook Chapter on Environmental Health
6. Propose conference programs
7. Lead the specific IEQ Conference programming and event planning (in association with CEC)
8. Control and update website content
9. Administer EHC Award
10. Communicate policy (such as Emerging Issue Briefs)
11. Review RTARs
12. Interface 241 and Position Documents assigned by Technology Council



Alignment between CE IEQ and Other Committees, Councils and Liaisons

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Alignment between CE IEQ and Other Committees, Councils and Liaisons

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- **Current requests for engagement**

ASHRAE Engagement: National Academies Health in Buildings Roundtable (HiBR)

Purpose: The National Academies of Sciences, Engineering, and Medicine Health in Buildings Roundtable (HiBR) convenes cross-disciplinary stakeholders to advance research priorities and best practices for health-enhancing building strategies and technologies.

Commitment: ASHRAE Foundation approved a \$15,000 HiBR sponsorship (Winter 2025); current sponsors also include GSA and GBI.

ASHRAE Representation: Bill Bahnfleth serves as ASHRAE's primary representative in HiBR meetings.

HiBR Requested ASHRAE SME Engagement (2026) for three sessions:

- Data transparency (May 14)
- Indoor air quality (Sept/Oct)
- Data centers & community health impacts (Sept/Oct)

Why this matters: Participation reinforces ASHRAE's leadership and ensures ASHRAE expertise informs national-level research agendas and policy-relevant guidance on health in buildings.



Alignment between CE IEQ and Other Committees, Councils and Liaisons

ARPA-H PROGRAM

BREATHE

*Building Resilient Environments
for Air and Total HEalth*

*What if indoor air was
always safe and healthy?*

25%

target reduction in indoor
respiratory incidence — at a
10% return on investment.

Jessica L. Green, Ph.D. · Program Manager, Resilient Systems Office
Launched April 2024

VISION

A future with healthy indoor air for everyone — a closed-loop building ecosystem that detects bio-threats, assesses risk, and protects occupants in real time.

THREE TECHNICAL AREAS + NATIONWIDE EFFICACY TRIAL

TA1

Indoor Air Biosensors

Autonomous, cost-effective sensors for >25 airborne targets — viruses, bacteria, fungi and allergens — in near real time.

TA2

Risk Assessment Software

An Indoor Air Quality Index that fuses biosensor, building and health data into zone-level respiratory risk.

TA3

Healthy Building Controls

Smart, energy-aware interventions — ventilation, filtration, UVC disinfection — triggered by measured risk.

PROGRAM TIMELINE

FY25 → FY29

Phase I · 24 mo

Ramp-up & component development

Phase II · 12 mo

Chamber testing

Phase III · 24 mo

Manufacturing, install & field trial

Source: ARPA-H BREATHE Proposers' Day deck (May 2024) · arpa-h.gov/explore-funding/programs/breathe



Breakout Sessions – Session Structure

Time	Phase	What Happens
0 – 5 min	Open & Frame	Facilitator introduces the session topic, reads the guiding questions aloud, and confirms the scribe. Everyone reviews the session description on the handout.
5 – 50 min	Guided Discussion	Work through the guiding questions. Capture key insights and open questions. Make sure quieter participants are drawn in. Disagreement is fine: capture it, don't resolve it.
51 – 80 min	Action Development	Shift the group: "What should CE IEQ actually do?" Aim for 1–3 concrete, ranked actions. Each action needs a timeline (short-term/long-term) and an owner type. One strong action beats three vague ones.
81 – 90 min	Wrap & Save	Scribe reads report back to the room. Confirm everything is accurate. Save the completed report to the shared drive. Room resets for next group.

Breakout Sessions – Rules of Engagement

Rule	What It Means for This Room
Chatham House Rules	Conversations in this room are off the record. You may share ideas and conclusions with others after the retreat, but you may not attribute any specific statement to a named individual. This gives everyone the freedom to speak openly.
One Voice at a Time	Let people finish. If you have a reaction, hold it, it will land better when there is space for it.
Bring Your Best Thinking	Don't self-censor. The most useful contributions are often the uncomfortable truths.
Disagree Productively	Disagreement is welcome. Challenge the idea, not the person. If the group can't resolve a disagreement, flag it in the report rather than papering over it.
Stay in the Room	Phones face-down. Laptops closed unless you are the scribe. We have 60 minutes and it is not enough time to multitask.
Speak for CE IEQ, Not Your Organization	We each bring institutional perspectives, but recommendations should be framed as what is right for CE IEQ and the field, not what benefits any one employer or member body.
Equity of Voice	The facilitator will actively ensure everyone contributes. If you notice someone being talked over, name it. If you tend to dominate discussion, consciously hold space.
Concrete Over Vague	When proposing actions, be specific: who does what, by when, with what resources. "We should raise awareness" is not an action.
Honor the Clock	The facilitator is responsible for time. If they call a transition, support it, we cannot run over without affecting every other part of the retreat.



Breakout Sessions – Rules in Brief

10 Rules in Brief	What Makes a Good Action	Report Checklist
1. Chatham House Rules	<ul style="list-style-type: none">• Specific, not "raise awareness"	<ul style="list-style-type: none">• Session name + participants listed
2. One voice at a time		
3. Bring your best thinking	<ul style="list-style-type: none">• Has a clear owner type (staff, TC, member)	<ul style="list-style-type: none">• Key insights captured (3–5 min)
4. Disagree productively	<ul style="list-style-type: none">• Has a timeline (short / long-term)	<ul style="list-style-type: none">• Open questions noted
5. Stay in the room		<ul style="list-style-type: none">• 1–3 actions, ranked by priority
6. Speak for CE IEQ	<ul style="list-style-type: none">• Connects to CE IEQ's mandate	<ul style="list-style-type: none">• Each action has owner + timeline
7. Equity of voice	<ul style="list-style-type: none">• Is achievable with ASHRAE resources	<ul style="list-style-type: none">• Report saved to shared drive
8. Concrete over vague		
9. Honor the clock	<ul style="list-style-type: none">• Is ranked by priority vs. other actions	
10. Finish the report		

Breakout Rooms – After the Session

1. Your [completed report](#) goes directly into Friday morning's prioritization exercise. Incomplete reports make the prioritization harder for everyone.
2. On Friday, you have 20 minutes to walk the full group through your session findings. Use the report as your guide, no slides are needed.
3. The full group will then use dot voting to prioritize across all three sessions. Every recommendation has an equal shot, the more specific yours is, the better it will compete

Breakout Sessions (3:40 PM – 5:10 PM)

Breakout Session A.1 Society-level Harmonization Strategy Commitments(Room TBD)

- **Bill Bahnfleth**, Megan, Matthew, Erik, Stephanie, Mark, John *

Breakout Session A.2 External Coordinated Health/IEQ/IAQ Nexus Commitments (Room TBD)

- **Corey**, Hailey, Hassan, Meghan, Wade, Leigh Lain, Adrienne*

Breakout Session A.3 Marketing, Communications & Member Value (Room TBD)

- **Robert**, Amr, Jason, Don, Marwa, Alice, Bill McQuade *

**Remote*



Potential Liaison and Partner Organizations

Internal and External Advocacy and Collaborations

Thursday Wrap Up



Friday April 24, 2026



Agenda – Friday, April 24, 2026

Time	Topic	Lead
7:30	Arrival and Breakfast	
8:00 – 8:10 AM	Thursday recap and Friday Agenda <ul style="list-style-type: none">• Summary of key themes and discussions.• Review agenda.	
8:10 – 8:15 AM	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.	
8:15 – 9:15 AM	Breakout Session Summaries (~10 min each) <ul style="list-style-type: none">• Session A: A.1, A.2, A.3, — Session leaders present.	Session Leaders
9:15– 9:25 AM	Break	

Agenda – Friday, April 24, 2026

Time	Topic	Lead
9:25 – 10:00 AM	<ul style="list-style-type: none">CEBD Update ~20 minAlignment between CEBD and CE IEQ	Blake/Carrie Marwa/Wade Stephanie
10:00 – 11:00 AM	<p>Prioritization of CE IEQ Activities</p> <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.	Marwa
11:00 – 11:15 AM	<p>Closing Reflections</p> <ul style="list-style-type: none">Lessons learned from outgoing members (~5 min each).	Outgoing Members
11:15 AM – 11:30 AM	<p>Wrap Up</p> <ul style="list-style-type: none">Summary of the strategic planning activities.Review post-strategic planning session activities and next steps.Review of action items.Group Photo	Marwa
11:30 – 12:00	<p>Daikin Tour followed by Co-Centers of Excellence Luncheon</p> <p>The CEBD Strategic Planning session begins promptly at 1:00 PM.</p>	



Agenda – Friday 24 April 2026

7:30 AM – 8:00 AM	Arrival and Breakfast
8:00 AM – 8:10 AM	Thursday Recap and Friday Agenda
8:10 AM – 8:15 AM	Breakout Session Discussion Prep
8:15 AM – 9:15 AM	Breakout Session Summaries
9:15 AM – 9:25 AM	<i>Break</i>
9:25 AM – 10:00 AM	CEBD Update
10:00 AM – 11:00 AM	Prioritization of CE IEQ Activities
11:00 AM – 11:15 AM	Closing Reflections
11:15 AM – 11:30 AM	Wrap Up
11:30 AM – 12:00 PM	Daikin Tour



Breakout Session Summaries

- Bill Bahnfleth
- Corey
- Robert

Alignment between CE IEQ and CEBD

Effective alignment of the Centers of Excellence depends on:

- Relying on Committee leadership
- Utilizing Committee Liaisons to communicate activities/efforts
- Partnering with staff liaisons



Alignment between CE IEQ and CEBD

Partnering with Staff Liaisons because: 

- They love to support our Committees!
- More than administrative or note-taking resources.
- When actively engaged, they serve as strategic partners to committees.
- Ensure alignment with organizational and strategic goals.
- Provide access to relevant resources, institutional knowledge, and staff expertise.
- Facilitate timely/accurate information flow among committees, leadership, and staff.
- Reduce duplication of effort across committees and initiatives.
- Manage projects, track milestones, and ensure deliverables are met.
- Provide clear, consistent reporting to leadership and governance bodies.
- Support coordination across ASHRAE teams and external partner organizations.
- To be effective, staff liaisons must be kept informed, engaged early, and integrated into committee planning and execution.

Prioritization of CE IEQ Activities

- Review the full action list generate across all sections
- Add any missing items
- Voting & prioritization: results will drive CE IEQ actions for 2026-28 and beyond

Closing Reflections & Wrap Up

1. Lessons Learned

2. Wrap Up

- Summary of the strategic planning activities
- Review of Post-Strategic Planning Session Activities and Next Steps
- Review of action items
- Group Photo
- Daikin Tour
- Group Lunch with CEBD



Thank You !!!!

