

Employer Support Working Group Attendees				
Commercial HVAC Consultant to SDG&E	Charles	Seegerstrom	Commercial HVAC Consultant	Energy Efficiency Program Consultant
EMI (EMI Consulting)	Ellen	Steiner	WHPA Co-Director	Energy Efficiency Program Consultant
Honeywell ECC	Daniel	Jones	Commercial Contractor Development Specialist	Controls (Manufacturer or Distributor)
HVACRedu.net	Jeff	Taylor	SCE Liaison	Educator, Trainer
IHACI (Institute of Heating and Air Conditioning Industries)	Susie	Evans	Executive Vice President	Contractor Association
Tre' Laine Associates	Pepper	Hunziker	Learning Manager	Energy Efficiency Program Consultant

Ellen Steiner (EMI) – Took the changes for recommendations #1 and #2 and is now going to address #3.

Recommendation #3 is updated to “Development of HVAC Sector Strategy Contractor Recognition Strategies.” Some language is the same but has been softened a bit. Group discussed need to support HVACR contractors who are “doing the right thing,” as demonstrated through:

- 1) pulling permits;
- 2) supporting development for employees; and
- 3) ensuring employees have the time to do standard space installation and maintenance work.

While pulling permits is out of the scope of this Working Group, we recommend that Sector Strategy (SS) include recognition strategies that provide these contractors with a tool to differentiate themselves in the market.

Possibility discussed was a badge for those who support professional development and ensure they have the time to do standard space installation and maintenance work. According to the Learning Times team, a badge is a validated display of accomplishment, skill, quality, or interest that can be earned in any learning environment; it can also represent academic achievement or acquisition of skill. Working Group purposely selected a badge as opposed to a credential to ensure that this designation does not compete with other industry certifications in the market.

Key question that needs to be addressed is what are the requirements for contractors to earn this badge? Given the recent passage of SB 350, it would seem that the requirements would align with the “responsible contractor policy” language as noted in the bill: *Commission shall adopt, implement, and enforce a responsible contractor policy for use across all rate-payer funded EE programs that involve installation, maintenance, or both by building contractors to ensure that retrofits meet high quality performance standards and reduce energy savings lost or foregone due to poor quality workmanship.* While we recognize it will take some time to sort out the specific impacts of this bill, in the meantime, we recommend that the SS consider the SCE HVAC Optimization Contractor and Technician Program eligibility requirements as an example of potential criteria to earn this badge. However, who would grant the badge and manage the badging process?

Another working strategy considered was a public list of HVAC contractors who “do the right thing” that could be similar to Angie’s List and incorporate customer feedback functionality. It could also be an expansion of similar lists, such as the PG&E Trade Pro Alliance or IOU Program-eligible contractor lists. Again, criteria would need to be developed regarding inclusion and who would manage the list.

Let’s start with the badge.

Pepper Hunziker (Tre’Laine) – When talking about the badge, I would like the words “other” and “to not be confused with other certifications” removed because it makes them more equal. PG&E Trade Pro Alliance thinks that SDG&E also has one, but we might want to make sure that we don’t just talk about only one of the IOU programs.

Ellen Steiner (EMI) – I made those changes. The goal now is to get through #3 and #4, send them out, ask for a vote, and then send to Sector Strategy Committee.

Pepper Hunziker (Tre'Laine) – If there are aspects that some members aren't in support of, how will WHPA address this?

Ellen Steiner (EMI) – In the work process summary form, there is a place to include the minority opinion and work with those to word the minority opinion as they would like it to be seen.

The other piece that was considered is the public list. To Pepper Hunziker's (Tre'Laine) point earlier, the recommendation is to develop *something* and not necessarily just recommend the badge idea. We're saying to develop recognition strategies, and one idea could be the badge idea.

Moving to recommendation #4 of the clearinghouse of internship and pre-apprenticeship program opportunities – Through discussion of how employer support can be demonstrated, significant focus centered on internships and pre-apprenticeships. Working Group identified a gap between students and contractors (employers) for internship and pre-apprenticeship opportunities. Most contractors don't know how these programs work or how to get involved with them. Thus, the Working Group recommends that the SS develop a clearinghouse of these program opportunities for hosting on the WHPA website. This clearinghouse would parallel the sales trainer and sales estimation tools clearinghouses hosted on the WHPA website. Working Group realizes that this deviates from the HVAC SS on the incumbent workforce; however, as internships and pre-apprenticeships offer an opportunity to demonstrate employer support, we wanted to include them in recommendations.

Pepper Hunziker (Tre'Laine) – Feedback is that others love the idea of the internships. If looking at the specific activities that IOUs are tracking regarding QI and QM, how would we effectively show the correlation between an internship at a college or high school to a specific QI/QM type of training, and are there suggestions from the group to show how employers were supporting activities for the SS specifically?

Ellen Steiner (EMI) – First part of the statement, I would take it as a recommendation and add a statement that the internship and pre-apprenticeship clearinghouse would need to be tied to supporting contractors who are “doing the right thing.”

Pepper Hunziker (Tre'Laine) – Any way it can be tied back to the specific items on the SS on standards-based QI/QM? It's one thing to have the internships, but if people aren't being introduced to these standards or learning how to apply them in the business, it's not the match that would be most effective.

Ellen Steiner (EMI) – So, a clearinghouse of industry standards-based?

Pepper Hunziker (Tre'Laine) – And thinking ahead to implementation, ensuring that things are related to practice, and that people are grasping the key issues the industry is after.

Susie Evans (IHACI) – Publishing a release from HVAC Workforce Development Foundation reporting over 100,000 new HVACR technicians and installers will be needed; but due to critical shortage, technical and community colleges are not filling the needs to meet current and forecasted demand. Almost one-half of all technicians and installers will retire in the next decade. Point is that we're talking about internship programs when in reality there's going to be a demand to fill those spots. There's going to be a frenzy just to bring people into the industry let alone get them through the internships.

Pepper Hunziker (Tre'Laine) – Asks Susie Evans (IHACI) what her insight is regarding statements to strengthen the SS and how would the employer support element show up in the workforce?

Susie Evans (IHACI) – Need to recognize and acknowledge those companies that are supporting their employees in terms of training whether on incumbent workforce or working with high schools to overcome the stigma of the trade. One of the issues has been high school career counselors not being receptive to promoting the trade. There is work to be done at the high school level to educate students regarding opportunities.

Pepper Hunziker (Tre'Laine) – Are you suggesting more outreach? Or are there other things we can do for the incumbent workforce to show employer support that we haven't already marked down?

Susie Evans (IHACI) – We should stress that employers need to show some kind of proof they are training their employees, particularly the incumbent workforce.

Pepper Hunziker (Tre'Laine) – Think that we have that, but how do we show proof?

Susie Evans (IHACI) – Through attendance, registration sheets, certifications of completion, etc. I do not like to get into that type of detail, but how else would you do it? They will have to show you something.

Ellen Steiner (EMI) – That could be part of the survey—request to send in X-Y-Z.

Pepper Hunziker (Tre'Laine) – Wants actual proof.

Susie Evans (IHACI) – IOUs all virtually have registration lists. There is a record somewhere.

Pepper Hunziker (Tre'Laine) – Is there a marketing aspect as well? How would we show the delta of where we used to be to where we are or where we want to go? More outreach to engage people? Should we add that to the report?

Ellen Steiner (EMI) – Add to the letter of intent: *As part of this letter, employers will also commit to both (1) providing evidence of support (such as records of individuals registering and attending training opportunities) and (2) responding to a semi-annual brief survey.*

Susie Evans (IHACI) – Would like to take out the word “registering.”

Ellen Steiner (EMI) – Letter changed from “registering and attending” to “completing.”

Susie Evans (IHACI) – Another issue. There are some contractors who provide their own in-house training. How will we account for that?

Pepper Hunziker (Tre'Laine) – Think it can be open, as long as there's proof. Maybe it's a recommendation.

Ellen Steiner (EMI) – So how do we solve it?

Pepper Hunziker (Tre'Laine) – The recommendation or suggestion is that we start getting people to actually complete these trainings. Add as a component to the actual recommendation, we need to figure out a strategy to acknowledge when there is in-house training.

Ellen Steiner (EMI) – Okay, I will add that.

Susie Evans (IHACI) – Sometimes this involves the utility companies, where there are a number of organizations (including IHACI) that are working with the IOUs and offering educational and training opportunities. So that data should be available. Things need to be done to be progressive, like expansion of training opportunities, curriculum, etc. Keep the interest level high. Need to push the envelope. Need to make sure that we're getting contractors to recognize the need to take advantage of the opportunities afforded to them.

Pepper Hunziker (Tre'Laine) – One of the activities for the SS was to get a collective summary of all the trainings that are happening. IHACI and other training organizations help the IOUs to create that list. So we can go back to stakeholders and say, “We as a collective put these things together, knowing that your feedback to us was compelling.” Exciting opportunity going forward.

Susie Evans (IHACI) – Very big on wanting to make sure that contractors who are “doing the right thing” start realizing the benefit for doing that. They are so severely outnumbered, and we have to find a way to do that. Referring to Angie's List, apparently they are encountering some difficulty. Just from a marketing or sales perspective, Angie's List is not that well received right now. Maybe we should take that out and reference a referral program.

Pepper Hunziker (Tre'Laine) – Good idea. More of a recognition than a referral site.

Susie Evans (IHACI) – Let's just take out that this could be similar to Angie's List.

Unknown Male – From a contractor's perspective, I've always shied away from Angie's List. My opinion is that they are trying to do what home warranty companies are trying to do. They're working their way into regulating what contractors can charge.

Employer Support Working Group November 19, 2015

Pepper Hunziker (Tre'Laine) –I think we should go specific and simple. Rather than a specific entity, support making the change.

Susie Evans (IHACI) – For contractors who do the right thing, they should be acknowledged accordingly or we should at least develop a vehicle whereby they can be recognized.

Pepper Hunziker (Tre'Laine) – However, “doing the right thing” is hard to quantify.

Ellen Steiner (EMI) – It is defined the document.

Susie Evans (IHACI) – Not the most sophisticated language, but it is exactly what we’re talking about. Everyone knows the difference between a contractor who is “doing the right thing” and one who is not.

Ellen Steiner (EMI) – Seems like the most effective way to communicate it.

Susie Evans (IHACI) – It does. However, we didn’t mention SoCalGas in here; maybe we should include them to be all-inclusive.

Ellen Steiner (EMI) – I think it’s hard because they do not really do a lot of HVAC programming, but they do try to stay involved.

Pepper Hunziker (Tre-Laine) – I think that the other utilities are used as a reference for a certain activity that they do. Not certain that SoCalGas has a Trade Pro Alliance like PG&E and SDG&E, not even certain if SCE does.

Susie Evans (IHACI) – I would mention all major IOUs or just reference “IOUs.”

Ellen Steiner (EMI) – Like SCE, the HVAC Optimization Contractor and Technician Program is a “thing,” and that is important because it is a key part of the recommendation. But I will see if I can get SoCalGas in there somehow. They funded some of these clearinghouses that are in recommendation #4, so potentially I can get that in there.

Close the meeting a bit early. Going to make edits and get this to everyone right now so they can read one more time for the final comment period—I will take feedback, incorporate it, then voting on it will be the next phase.