

Employer Support Working Group Attendees				
AHRI	Warren	Lupson	Director, Education	HVAC Manufacturer Association
Brownson Technical Center	Bill	Brown	Chief Operating Officer	Educator, Trainer
Commercial HVAC Consultant to SDG&E	Charles	Segerstrom	Commercial HVAC Consultant	Energy Efficiency Program Consultant
EMI (EMI Consulting)	Ellen	Steiner	WHPA Co-Director	Energy Efficiency Program Consultant
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) – Sent out a draft of a work product (operationalizing Employer Support for the HVAC SS). Don't have enough for a vote so will take input from today, integrate it into the paper, and send it back out for a vote via email. Hoping to send it to the Executive Committee in December for a vote at either the scheduled EC Meeting or an email vote.

Beginning parts are standard pieces of all WHPA work products – Describe HVAC SS Committee and how it aligns with the strategic plan. Noted the Committee chair, vice chair, Sector Strategy (SS) Committee members (put an asterisk next to all Employer Support Working Group members), Staff, and then into the document. Goes into some background, talks about what was the ask, then talks about recommendations for operationalizing Employer Support.

Pulled some literature as a foundation to this piece. If others think there's something to be added, send it to Ellen Steiner (EMI). Talk about some research from 2007-2015. Pepper Hunziker's (Tre'Laine) comments are in the document, and she noted something about Goal 5.

Here are the important pieces: Recommendation #1 – Expansion of Employer Support definition – current definition of Employer Support in the WE&T SS background definition and application document (approved by the EC in December 2013) is employers commit to hiring and promoting trainees or ensuring that they perform the skills they apply as part of their job. Working Group recommends that the definition be expanded to be more comprehensive to include:

- 1) Employers identifying and articulating workforce issues and specific skills and competency needs of the industry
- 2) Employers committing to provide work-based learning opportunities
- 3) Basically what was already there—New definition draws equal emphasis on both employer input into the SS as well as employer commitment to the SS.

Did I get that right and do you agree that we want to expand the definition?

Pepper Hunziker (Tre'Laine) – Can I get clarification of 1st bullet point “Employers identifying and articulating workforce issues” please?

Ellen Steiner (EMI) – Came out of discussion from last month. Actually used specific words from the transcription. Part of the input should be the employers having a role in identifying and articulating the workforce issues and the specific skills and competencies. Right now the definition, as it reads, doesn't seem to include the employer *input*; it's really just how they're committing to the SS principles. This is the idea that the WHPA is, in fact, acting as a steering committee with the WHCR collaborative providing input based on their findings and different groups coming to the SS team providing input regarding what they see as needs as the larger workforce issue and the specific skills, etc.

Pepper Hunziker (Tre'Laine) – Confused with articulating. Do you mean articulating with the specific skills and competencies? Are the employers identifying the workforce issues then articulating the skills and competencies to address those issues?

Ellen Steiner (EMI) – In the discussion, it seemed like people wanted to not only identify them but also that they were communicating and working with them. Could take that part out? Agree it is kind of confusing.

Susie Evans (IHACI) – Agree with that recommendation. Think that the employers will be identifying the workforce issues, skills, and competencies based on their own business models. There are needs of the industry while there is a lot of overlap; but if you're primarily a residential contractor, you may be looking for certain specific needs in that arena versus a large commercial or industrial contractor. Think that "and articulating" isn't really necessary.

Bill Brown (Brownson Technical Center) – Chris Compton's group (HVACRedu.net) is doing a lot of work on the competencies. Again, employer input is a big part of that.

Ellen Steiner (EMI) – I think this point adds recognition to all of the work that the WHPA Working Groups are doing as well as other groups that should be providing input in the SS.

Susie Evans (IHACI) – I know that Chris Compton (HVACRedu.net) is trying to address that. Good thing about this definition is that it solicits that input specifically from employers. Think that's something that might be missing in other areas. Need to make sure that these things are what the employer wants, because they're the ones doing the hiring. Think that it's good that it's specified.

Pepper Hunziker (Tre'Laine) – Think it's broken out well. Employers are identifying the issues and they're committing to providing work-based learning and committing to hiring and promoting in correlation with those goals. Think it's consistent.

Charles Segerstrom (Consultant to SDG&E) – There are a lot of different needs of the industry. One could be on the low road and the need to make a profit and not advance the bold initiative of HVAC. Want to say somehow that the new best practices are the needs of the industry.

Pepper Hunziker (Tre'Laine) – Not just saying we're pulling together but that we're pulling together for a cause.

Ellen Steiner (EMI) – I would like clarification regarding Charles Segerstrom's (Consultant to SDG&E) comment.

Charles Segerstrom (Consultant to SDG&E) – Think that it's implied but I think it should say it more directly. Talking about best practices for QI and QM. There are low-road contractors who would say my need is to make a big profit flying under the radar.

Susie Evans (IHACI) – Couldn't agree more; all of these things need to be focused on compliance. If compliance isn't in there, there's no vehicle for success. We can talk about this, but by the same token, compliance is the driver.

Charles Segerstrom (Consultant to SDG&E) – With compliance in hand and best practices as the focal point, I think we're all promoting the same vision. Just want a little more specificity on best practices.

Pepper Hunziker (Tre'Laine) – Think that it shows up in Recommendation #2 for letter of intent. Describes some of the different activities defined as best practices.

Ellen Steiner (EMI) – I have this now as "Employers identifying the workforce issues, best practices, and specific skills and competent needs of the industry." Don't know if compliance specifically fits in here (general-type direction).

Susie Evans (IHACI) – Just want to make sure that everything is built on this solid foundation. We can talk about best practices all we want, but it's unlikely to occur to the extent we want. We need to develop a level playing field for the industry. Don't care where it goes, it just needs to make sure that it is addressing the foundation.

Ellen Steiner (EMI) – Moving on to the second element. Employers committing to provide work-based learning opportunities. I included it based on our discussion.

Charles Segerstrom (Consultant to SDG&E) – Questions revolve around how did you land on 3? I think there's some incongruity between the examples (series of classes vs. a one-off update or quick seminar).

Pepper Hunziker (Tre'Laine) – What do you do when people need incremental updating? Maybe they've already done the intensive training and just need a quick brush-up. How do we account for that?

Charles Segerstrom (Consultant to SDG&E) – Don't want to inadvertently drive people away from advanced update classes.

Ellen Steiner (EMI) – Maybe in the definition we keep it broad and get more specific in the recommendations.

Pepper Hunziker (Tre'Laine) – Maybe we want something that offers either credentials or continuing education units.

Susie Evans (IHACI) – We offer NATE Training Series. Conceivable that they'd go to specific classes to address a specific competency and not need all of the classes.

Pepper Hunziker (Tre'Laine) – How deep in the weeds do we want to be with the language?

Ellen Steiner (EMI) – With the definition, it's a broader stroke. Want to be inclusive of all the different elements of employer support. Get the definition right then move on to specifics. Are there issues with bullet #3? Employers committing to hiring and promoting trainees or assuring that employees apply the skills they acquire as part of their job.

Susie Evans (IHACI) – To me, junior people going into the workforce will end up being more advanced individuals and are receiving the appropriate onsite training. Think it is kind of a given.

Ellen Steiner (EMI) – Think that it is the spirit of what a SS should include. Added new definition, "Draws equal emphasis on both employer input into the SS as well as employer commitment to SS principles." Recommendation 2 – Letter of Intent. Related to the 2nd piece of the definition (work-based learning opportunities), employers will be asked to voluntarily sign a letter and commit to a number of employer support actions (had 3, but number was arbitrarily generated).

Pepper Hunziker (Tre'Laine) – #2, question is, is there is a list that doesn't offer any other possibilities? There may be others that come up (have to select from the list). Example might be hiring from community college chancellor's website or internship programs with high schools, etc.

Ellen Steiner (EMI) – List was taken from past research and WHPA discussions, and we can add to and subtract from the list. This is WHPA's recommendation; the IOUs will take or leave what they want regarding the list, but this is a starting point. Will need to change the language to something saying that these are examples of what that might look like.

Warren Lupson (AHRI) – #1 promoting higher education and training, in my world this means college or four-year universities. Don't think that's the intent, so take out "higher." Offering employees flex time to attend educational offers, I think that's breaking the law.

Susie Evans (IHACI) – Problem in California because they're on OT for everything over 40 hours a week or 8 hours a day.

Pepper Hunziker (Tre'Laine) – Are there different ways to get at what we're trying to say?

Susie Evans (IHACI) – Support employee efforts to attend educational offerings?

Ellen Steiner (EMI) – Is that the same as #1? Promoting?

Susie Evans (IHACI) – Promoting is different. More often than not, employers will receive info about training classes but won't share it with the employee.

Ellen Steiner (EMI) – Will change to "support employees' efforts."

Pepper Hunziker (Tre'Laine) – #9 "celebrate completion of credentials." Not sure what that will look like. Important to focus on industry recognized credentials. Want attainment rather than completion. Want industry recognized in the definition.

Ellen Steiner (EMI) – More about the spirit of taking the time to recognize that someone did this. Do we want something else in here about credentials?

Warren Lupson (AHRI) – Think it could be anything. Credentials could be anything. Putting something down that indicates that any type of certificate or certification that shows they've obtained something for their knowledge could be a footnote.

Ellen Steiner (EMI) – Will work on wording and shoot it back to others. I will take out all instances of “higher” in terms of things referencing education. Anything else on that should be on the list? Employers will commit to responding to a semi-annual survey, asked to respond to a minimum of two surveys total, with goal to provide evidence of what's actually taking place and feedback regarding SS.

Susie Evans (IHACI) – What kind of survey are we talking about? Length?

Pepper Hunziker (Tre'Laine) – Should not be anything laborious or time-consuming.

Ellen Steiner (EMI) to add clarifying language regarding the length like “the survey will be brief.” Recommendation #3

Pepper Hunziker (Tre'Laine) – #3 is very troublesome. Don't think it's as good of a fit.

Susie Evans (IHACI) – The third one is going to be problematic. If it's going to take 3-4 times longer to perform a standards-based installation or maintenance (a service), I think that they're placed in an unfair advantage (probably talking about those who aren't going to do this).

Pepper Hunziker (Tre'Laine) – With employer support, moving beyond people participating in utility programs, there is a bigger net of people. The badge is like a credential; creating this new badge or credential could be problematic. This whole piece is very burdensome. Not sure that it will elicit the type of end result we're looking for.

Charles Segerstrom (Consultant to SDG&E) – Think it's challenging but like the recognition to the overall technicians' wherewithal rather than just the owners'. Could lead to future developments for contractors licensing for HVAC that gets the level of the licensing down to the technician not just the owner. I like the concept, but it may be too difficult for WHPA. Need a new infrastructure to do it right – databases, maintenance, etc.

Susie Evans (IHACI) – That's basically creating a new certification body, and I don't think WHPA had planned on doing that. Already too many certifications.

Ellen Steiner (EMI) – Could remove it completely. But we've spent a lot of time on this. Could rework it and be much less specific.

Pepper Hunziker (Tre'Laine) – Think that it's going to be difficult to ask utilities regarding employer support through this very specific HVAC SS, so whatever the recommendation is, hope that it's something the IOUs can use. This just seems a little too big in terms of scope.

Charles Segerstrom (Consultant to SDG&E) – Can we back it down and still include it? It deserves discussion. The badge would be something that's part of IOU program qualifications.

Pepper Hunziker (Tre'Laine) – There are already branding issues in IOUs. Think it will be difficult because employer support will come from people both within and without of the program. The intent was to give recognition and support to those working to up-leveling the workforce. Not sure this is the best and most efficient way to make this happen.

Bill Brown (Brownson Technical Center) – Would hate to think that the CPUC would mandate something like this. But, badging is up and coming to show competence; perhaps lesser than a certification, but badging could differentiate people. Don't think that mandating is a positive step.

Pepper Hunziker (Tre'Laine) – Is SDG&E's trade website a good example of what we're shooting for?

Charles Segerstrom (Consultant to SDG&E) – Doesn't drill down to this level and creates a double-standard.

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Pepper Hunziker (Tre'Laine) – Our focus is employer support for up-leveling and for providing opportunities for workforce development; compliance is a different issue.

Ellen Steiner (EMI) – Compliance is out of scope for this Working Group. We specifically talked about it multiple times, so maybe we need to be more specific about compliance rates.

Pepper Hunziker (Tre'Laine) – Somehow broaden the recommendation to give *kudos* to contractors who participate in the SS effort—maybe a badge is just an example of this.

Ellen Steiner (EMI) – Change Recommendation #3 to reflect the development of HVAC SS contractor recognition strategies (or something to that effect), and make it much broader and list elements as examples.

Charles Segerstrom (Consultant to SDG&E) – Perhaps an example of a part solution. Trade Pro Alliance lists those who qualify with utility criteria with some general language. In the context of that listing, list the credentials achieved. Would have a master list but those who have gone beyond the minimum would be differentiated. Not a badge but an additional piece to separate.

Ellen Steiner (EMI) – Will take another stab, but propose meeting for next week, November 19.