

Committee Chair Daniel Jones (Honeywell) called the meeting to order.

Employer Support Working Group Attendees				
Brownson Technical Center	Bill	Brown	Chief Operating Officer	Educator, Trainer
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
SDG&E Commercial HVAC Consultant	Charles	Segerstrom	Commercial HVAC Consultant	Energy Efficiency Program Consultant
Tre' Laine Associates	Pepper	Hunziker	Learning Manager	Energy Efficiency Program Consultant

Daniel Jones (Honeywell) – Thanks to everyone for your contributions. I’m proud to be part of this effort, and what we do here does affect the rest of the U.S. Several counterparts at Honeywell have said that now the ACCA/ASHRAE Standard is in place, others are looking to us to know how to proceed.

<There was discussion regarding taking meeting minutes. Ellen Steiner (EMI) volunteered to be note taker. >

Ellen Steiner (EMI) – Goal 2 is to operationalize the HVAC Sector Strategy Employer Support as defined in the WE&T Sector Strategies Background, Definition, and Application document approved by the ED in December 2013. Employer Support is defined as the following: Employers committed to hiring and promoting trainees or assuring that trainees apply the skills they acquire as part of their jobs.

We want to operationalize this so when we go to the ED, we can be confident about how we operationalize employer support. In the implementation plan, we defined it in the following ways: first, a milestone for inventory of parallel efforts across the state... we’ve already defined community college HVAC collaborative effort, I think I have enough information to pull together goals, scope, objectives, audience, etc., for that piece. It’s actually supposed to be done by July 31. Our goal is to inventory all efforts that this team knows of and then analyze that data to identify possible efforts that the IOUs

should be leveraging, to identify gaps, etc. This effort needs to be completed by end of September with a goal for Executive Committee approval by September 30, 2015. IOU Sector Strategy team has been working very hard on this and is very anxious to get this data. Let's start off by identifying efforts going on in the state that we may not be aware of.

Pepper Hunziker (Tre'Laine) – Hoping to get specific contractor feedback. Maybe go through CQM Committee to see if any contractors are willing to share thoughts.

Daniel Jones (Honeywell) – This is a great idea. Good and bad would be beneficial to hear.

Ellen Steiner (EMI) – Pepper, is this related to inventory effort or is it more global?

Pepper Hunziker (Tre'Laine) – Trying to understand clearinghouse part of current practices. Interested to see what makes sense for how we would quantify or qualify employer support. Thinking about how some of the unions are doing things and what makes sense to create a pipeline and show support for up-leveling with existing workforce or how they bring new workforces in. If we're looking to up-level QI-QM KSAs, then how do we know that contractors are eager to pull those qualities into their businesses?

Ellen Steiner (EMI) – Like a push-pull strategy?

Pepper Hunziker (Tre'Laine) – Correct.

Daniel Jones (Honeywell) – How many contractors should we invite?

Pepper Hunziker (Tre'Laine) – For instance, Don Langston (ACCA/Aire Rite), Don Tanaka (UA), Mike Gallagher (Western Digital), Denny Mann (Marina Mechanical), Bob Wiseman (IHACI).

Susie Evans (IHACI) – You might also try John Dalton who is a commercial contractor.

ACTION ITEM – Susie Evans (IHACI) to send Daniel Jones (Honeywell) Mr. Dalton's contact information.

Pepper Hunziker (Tre'Laine) – Even if they can't make the meetings, we might still be able to send them questions.

Susie Evans (IHACI) – If we could identify some specific questions, I could send that out to far more than just 2-3 contractors to get a variety of feedback, but we have to be very clear as to what we're asking.

Susie Evans (IHACI) – After the last meeting, I talked to several of our contractors. I was surprised by the resources they use to hire employees: employment agencies (one called HVAC Agent), Craig's List, posts at distributor branch locations, and many of them it's by word-of-mouth. The Number One issue for everyone, however, was that the character and attitude of the individual interviewed—what we call soft skills—took precedence over everything else.

Bill Brown (Brownson Tech) – Two weeks ago I was at a presentation in a room full of different schools and different occupations. The presenter said to get your advisory committee to teach soft skills. Every job everywhere, they're looking for soft skills.

Susie Evans (IHACI) – Heard Michael Josephson at a labor law conference several years ago. He has an organization called CHARACTER COUNTS! and his ongoing message is to hire for character because skills can be taught. This is a philosophy shared by many employers.

Ellen Steiner (EMI) – If they are hiring for character and attitude, did they discuss how they up-level their skill sets?

Susie Evans (IHACI) – Many of them send employees to IHACI training classes. We deal with incumbent workforce, and membership is aware of who's doing the teaching. Certainly looking for students who have graduated from a two-year technical college or ROP or sometimes with any background in construction, paring these with a senior tech as an apprentice and couple this with training that may be available. There's a lot of on-the-job training with a lot of mentoring.

Bill Brown (Brownson Tech) – With so little formal training, this is all they've got. Only 5-10% of the students I teach through an IHACI class typically indicate they've had formal training. Those are probably some of the better students.

Susie Evans (IHACI) – That seems to be the norm. I've spoken with 3-4 contractors. Any certificate will help, but if someone is looking for a journeyman, the contractors want experience—above all, they want experience. Having a bunch of certificates and degrees does not mean they know what to do on the job. On the flip side, someone may not have these certificates but be really good or they may have been doing something wrong in the field for the past 10 years. The other thing that came up was whether an individual has communications skills. Can this person communicate with a senior tech, a homeowner, a building owner, etc.? It's no different than with any other job in that the training may be required in certain areas, but *you've got a great kid on your hands*.

Bill Brown (Brownson Tech) – Then how are we going to phrase these questions to contractors?

ACTION ITEM for Ellen Steiner (EMI) – I'll take a stab at putting something together—easy questions with easy answers.

ACTION ITEM for Susie Evans (IHACI) – We will send it out but there's no guarantee what the response will be.

Charles Segerstrom (Consultant to SDG&E) – We're talking about getting trainees to apply standards-based skills. What I hear is it's not just the skills, it's about but the ethics and how those skills are applied.

Ellen Steiner (EMI) – It's also related to Standard 180 and developing a relationship with the customer.

Susie Evans (IHACI) – Yes you're right, Charles. Can that individual communicate effectively to the customer what the needs are and why they should be doing certain things? It can be challenging if this is not a forte.

Daniel Jones (Honeywell) – A contractor in Fresno had a great technician whom they decided to promote to management. Because of his lack of soft skills in communications, they discovered it was a mistake because he couldn't communicate with the customer—he didn't have communication skills.

Susie Evans (IHACI) – I think this happens in many fields with those who have technical aptitude and they are not skilled in customer service. If I had a problem with the HVAC system here in office, I would prefer someone with good technical skills rather than communication skills.

Bill Brown (Brownson Tech) – We teach customer service and sales all in one package. Some of this may be hard-wired, but you can teach some of it.

Pepper Hunziker (Tre'Laine) – Are there courses that teach these soft skills?

Susie Evans (IHACI) – Integrated but not a course dedicated to that particular area.

Daniel Jones (Honeywell) – Just Mark Jewell's course.

Susie Evans (IHACI) – The point is that it's not just one specific item for any employer going through the hiring process, and it is applicable to every industry.

Ellen Steiner (EMI) – What about employer support? Does IHACI have any offering? These people have taken these classes to support the employer to make sure these skills are used on the job.

Susie Evans (IHACI) – The philosophy is that if a student cannot apply something they've learned in the classroom to something in the field the very next day, the instructor has not done his job. Of course, it's in the contractor's best interest to prevent callbacks. Where this goes astray is when measures are not competitive, like when a contractor is expecting an employee to perform something that is not cost effective; for example, a tune-up. That tune-up may cost much more than what the contractor is able to charge for it. A contractor cannot perform measures if they are not competitive in the industry. These [soft skills] are embedded in IHACI training even though it's not a stand-alone class.

Bill Brown (Brownson Tech) – It's also important to NATE—how to communicate the benefits to customers. This is huge.

Ellen Steiner (EMI) – There are 200+ credentials out there. But what happens from the employer support perspective.

Susie Evans (IHACI) – Continuing education is critical because of Title 24 requirements and is constantly changing with a need for ongoing education. The challenge we face is not the people who are sitting in the classroom but the students who are not in the classroom, because there's no reason for them to be there.

Bill Brown (Brownson Tech) – One of the important things for NATE is the ongoing education requirement, which forces them to stay up to date.

Susie Evans (IHACI) – The CEC is adopting 2016 standards and moving toward zero net energy. Standards are constantly changing, and I think it's important to support these changes. Technology is also changing.

Daniel Jones (Honeywell) – Are there mandates for residential and commercial contractors to show they've completed certain courses?

<Consensus was there are no continuing education requirements.>

Susie Evans (IHACI) – May get backlash on this, but want to make certain that we are not making things more difficult for compliant contractors. What everyone wants in this industry is a level playing field.

Bill Brown (Brownson Tech) – This may just push contractors further into the underground economy.

Susie Evans (IHACI) – I am worried that if the regulations become so stringent that the contractors will just throw in the towel.

Daniel Jones (Honeywell) – Isn't it the compliant contractors who are already going to these classes?

Susie Evans (IHACI) – If we get too stringent, it's only impacting a smaller percentage of people.

Ellen Steiner (EMI) – What about tying salary and wage increases to better education and training certificates. Do we have any evidence of this?

Susie Evans (IHACI) – No hard data, but I think this works hand-in-glove.

Ellen Steiner (EMI) – When employers send their employees to training, is that flex time?

Daniel Jones (Honeywell) – There are many who go to classes during business hours. I deal with this on a weekly basis, yet sometimes it's after hours and they get paid for it.

Susie Evans (IHACI) – We will issue certificates of attendance. We can't do this with everyone, but we'll make this document available. Many students say that it is important and that it has bearing on raises, promotions, etc. Also, I must say, we have a number of students who are going independent of their employer. They feel great about being with peers. Most IHACI courses are taught by others in their same field and it provides a mutually beneficial relationship. These students take this initiative *on their own* and I think it's great.

Ellen Steiner (EMI) – Are there formal programs to support employers hiring students from these programs?

Susie Evans (IHACI) – Not sure I understand the question. I think employers are looking for people from a number of different sources like community colleges, IHACI training, etc.

Bill Brown (Brownson Tech) – We encourage students to join IHACI, or at least go to training so that they can see what’s going on and where they will *rub elbows* with people who will be doing the hiring. Can be powerful in interviews and could not agree more with Susie.

Susie Evans (IHACI) – We found that employers were not always sharing information about IHACI courses with students but yet the students wanted to go. So we set up a program where students pay \$75 a year and can be members in a special membership category. This also demonstrates their desire to be part of the industry. This is something else employers want to see and it is becoming important to business owners.

Pepper Hunziker (Tre’Laine) – When you have people coming into classes because a contractor has supported or mandated them to go, is any of this reflected in any documentation?

Susie Evans (IHACI) – We don’t capture this. So many registrations are done online; and generally speaking, unless that question is asked through the IOU’s online registration, we don’t have it, and I don’t think it’s included in surveys either.

Bill Brown (Brownson Tech) – Anecdotally, you see clumps of people from the same company in these classes. But there are also groups of self-motivated people who come of their own accord. From reading the audience, there are very few people who are only there because they have to be. Generally, these are all willing participants.

Susie Evans (IHACI) – Many times students will have discussions together after the classes. It’s networking, camaraderie, reinforces their ability to learn, and I admire these students.

Daniel Jones (Honeywell) – As an example, I have six dates set up with Johnstone Supply for VFDs, economizers, etc., and we have 35-40 technicians showing up at each of these sites in the Central Valley. Sometimes the techs go back to their employer and tell them that everyone needs to do this.

Susie Evans (IHACI) – This was brought up at last week’s training. Perhaps we need to show proof that the students are involved in training at some level as opposed to just an affidavit of competence. Continuing education is critical.

Ellen Steiner (EMI) – Are there more formal interventions that could be done to encourage employers to commit to hiring trainees?

Bill Brown (Brownson Tech) – In Energy Upgrade CA, a certain portion of workforce needs to be certified – this sort of forces that issue. I thought this was a workable way to do it.

Daniel Jones (Honeywell) – Must show competence with existing code without putting on more constraints than are already there. Use the *carrot instead of the stick*.

Susie Evans (IHACI) – Also want to ask if we are concerned that the employer support is not there? I can’t imagine an employer not wanting to hire someone from these programs.

Pepper Hunziker (Tre’Laine) – This is part of the requirements: it must be good for industry, and we must see employer support. So are we doing right thing in building up QI/QM curricula? If so, then

employers will want to hire these people. We should find the best way to provide support in these areas. Contractors are eager to tap into this. If this is already occurring, that's great. How do we build on it?

Ellen Steiner (EMI) – This is happening with contractors who are pulling permits, but are we moving the market? Sector strategy is a national concept. We want to be training folks who will then be able to apply these skills on the job. Having the time on the roof to apply these skills is an issue. Business models have to make sense. Ultimately, states want to be investing in efforts to ensure that they are getting an ROI.

Charles Segerstrom (consultant to SDG&E) – Bribery is not a long-term market transformation program. How do we get this to evolve without the *carrots*? Incumbent workers are not always supported by their employers who fear their workers might get too many skills and go off on their own. Part of the answer is in incentive programs and it is bribery. What is the exit strategy?

Daniel Jones (Honeywell) – Good points.

<People discussed next meeting time.>

Daniel Jones (Honeywell) – The more we dive in, the more questions we have. We are on a good track to start measuring employer support. I'll reach out to some of my distributors to see if they keep any records or tallies of how many training sessions they've done and how many people have attended in order to get a feel of what's going on. Technicians do seem to be getting something out of it. They seem to be applying it after they go through this. There are certainly a lot of people who are not going to these classes, but we can show there is already movement within the industry because it does benefit their business. It's a long-term value-add for contractors themselves.

Notes by Ellen Steiner, WHPA Staff
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