



**WHPA WE&T Committee Meeting  
(formerly Sector Strategy Committee)  
July 21, 2016**

Chair Jake Huttner (SCE) called the meeting to order.

<b>WE&amp;T Committee Attendees</b>		
<b>Organization</b>	<b>Name</b>	<b>WHPA Category</b>
Brownson Technical Center	Bill Brown	Educator, Trainer
CalCERTS	Janell Jacks	Certifying Body
CalCERTS	Susan Davison	Certifying Body
CEES-Advisors	Carlos Santamaria	Energy Efficiency Program Consultant
Charles Segerstrom Consulting	Charles Segerstrom	Energy Efficiency Program Consultant
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Charles Segerstrom Consulting	Charles Segerstrom	Energy Efficiency Program Consultant
HVAC Excellence	Renee Tomlinson	Certifying Body
HVACRedu.net	Chris Compton	Educator, Trainer
HVACRedu.net	Jeff Taylor	Educator, Trainer
HVACRedu.net	Scott Oakley	Educator, Trainer
IHACI (Institute of Heating and Air Conditioning Industries)	Susie Evans	Contractor Association
PHCC (Plumbing-Heating-Cooling Contractors National Association)	Chuck White	Contractor Association
PG&E (Pacific Gas and Electric Company)	Kristine Walker	California IOU
Rio Hondo Community College	Bruce Noble	Educator, Trainer
SCE (Southern California Edison)	Jake Huttner, Co-Chair	California IOU
SDG&E (San Diego Gas & Electric)	Bonnie Moreno	California IOU
SoCalGas (Southern California Gas Company)	Gary D. Johnson	California IOU
SynergyNexGen	Barbara Hernesman, Co-Chair	Energy Efficiency Program Consultant
Tre'Laine Associates	Pepper Hunziker	Energy Efficiency Program Consultant
<b>WHPA Staff</b>		
BJGustavson Consulting	Bonnie Gustavson	Other Stakeholder
Opinion Dynamics	Ellen Steiner	Energy Efficiency Program Consultant

<b>Agenda</b>
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1. Introduction Sub-Strategy 3.3.1/Charrette Update
2. HPBOP Training Pilot Program & Survey Updates
3. Coordinating Committee WE&T Updates
4. RQI & CQM WE&T Updates

### **Introduction Sub-Strategy 3.3.1/Charrette Update**

**UPDATE** by Barbara Hernesman (SynergyNexGen)

- Observation:
  - Prior to Charrette, came up with 16 recommended actions on Subsection 3.3.1
  - Actions organized into 3 categories:
    1. Access
      - Geographical, socioeconomic reach, diversifying instructional platforms (online, hybrid, face to face), networking with communities outside general territory
      - Inclusion of rural community: Strengthening relationships with builder exchange and contractor associations
    2. General Pipeline Development
      - Cross-cutting; prep to high performance through industry-recognized courses/credentials; filling the gaps as people leave high performance
      - Looking across K12, post-secondary, adult continuing education, incumbent, transition, and exiting
        - K9-12, college-age students: how to get trades into their mindset (well-paying jobs and careers in HVAC)
          - Possible model: Green Tree 60
        - Incumbent workers: KSAs, specifically on how to measure performance skills and how it leads to pathway to employment and career advancement
        - Existing workforce: ensure pathways to critical elements that allow them to stay up to speed with current technology and operations of equipment
      - Mentoring, coaching, on-the-job training, face-to-face training, focusing on performance
    3. Helping IOUs with WE&T Programmatic Support
      - Integrating WE&T in the front end during the design process to ensure program performance metrics are met successfully by working within the industry to understand needed performance criteria
  - Products and Worksheets will be available on WHPA website under the Charrette tab
- Recommendations:
  - Review Product and Worksheets on WHPA website under the Charrette tab

### **HPBOP Training Pilot Program & Survey Updates**

**UPDATE** by Carlos Santamaria (CEES-Advisors)

- Observations:
  - Development of High Performance Building Operations Professionals (HPBOP) Training Pilot funded by IOUs, Building Efficiency for a Sustainable Tomorrow (BEST) Center, Laney College, and National Science Foundation
  - Extracting knowledge from high performance operators currently implementing performance changes to buildings and large portfolios to develop a curriculum for incumbent workers

- BOMA California endorsed the High Performance Building Operator Training program and will participate and lend assistance in helping the program to continue – March 2016
  - Important to commercial real estate industry due to aging workforce and transfer of knowledge
- Developing a Curriculum (DACUM) – April 2016
  - Advisory committee of statewide stakeholders: unions, commercial real estate, government agencies
  - 10-12 subject matter experts statewide consulted for development
  - Developed a set of duties and tasks that are commonly used by all high performance operation professionals
- Conducting pilot training later this year and introducing to Committee to see if members would like to participate
- Recommendations:
  - None

### **Coordinating Committee WE&T Updates**

#### **UPDATE by Jake Huttner (SCE)**

- Observations:
  - Proposed decision issued by presiding ALJ on statewide third party program administration ruling
  - Coordinating Committee issued email: all meetings on calendar pushed back due to PD and compliance mandates affecting Business Plan templates and PA approaches
    1. PAs were going to present second sector draft of Business Plans for Coordinating Committee review – pushed back from August
    2. Filing date for Business Plans pushed to January 2017
- Recommendations:
  - Possibly host additional WE&T stakeholder engagement forums now that the deadlines have been extended

### **RQI & CQM WE&T Updates**

- Observations:
  - CQM
    1. Standard 180 User Guide Working Group: two-thirds complete with development of value proposition matrix for Section 4
    2. Next Step: coming up with actionable best practices for moving Standard 180 into a market transformation piece
- Recommendations:
  - None