



WHPA Newsletter | MARCH 2017

## Thanks, WHPA Members, for Another Record Year



WHPA members were on a roll in 2016, collectively producing [17 work products](#). That was the most in the seven-year history of the organization.

“The breadth and depth of the WHPA member’s input was exceptional,” said Mark Lowry, WHPA Chief of Staff. It included 11 Work Products, three interim Work Products, a webinar, a WHPA [membership kit](#), and the Existing Buildings Energy Efficiency Action Plan Committee (EBEE) Charrette with the California Energy Commission.

The [Industry Insights webpage](#) makes it easy to review these documents by sortable topics.

### Appreciation of WHPA Members from Industry and Utilities

Jeremy Reeve of San Diego Gas & Electric offered thanks to the WHPA Members from the California Investor Owned Utilities (IOUs), stating that “The contributions of the WHPA have been very valuable to the utilities.”

Five of the 2016 Work Products addressed commercial HVAC. Don Langston, Chair of the Commercial Quality Maintenance Committee since its inception in 2009 and a commercial HVAC contractor, said, “There is a lot to be proud of for everyone who is volunteering their time.”

### Other 2016 Accomplishments

- Expanded the **sphere of influence of the WHPA**, as Air Conditioning Contractors of America (ACCA) recognized the WHPA as a model of communication during a meeting at the White House.
- The **Department of Energy (DOE)** recognized the WHPA-adopted Work Product “Roadmap to Onboard and In-Field Fault Detection and Diagnostics.”

- A new process in the WHPA facilitated WHPA member organizations' **input to the California Public Utility Commission (CPUC)** comment periods related to policy and evaluation reports.
- Educated WHPA members on numerous [legislative and regulatory issues](#) and input opportunities to **build capacity of WHPA members** to effectively participate in the energy efficiency conversation in California, regionally, and nationally.

## Establishing a Worldview of Fault Detection and Diagnostics

Fault Detection and Diagnostics (FDD) comprises a vast array of HVAC technologies that assist in the identification of performance, maintenance, and repair needs using measurements and software intelligence. Understanding the world of FDD is crucial to fully realizing the benefits of energy efficiency because it presents new opportunities to address monumental challenges.

Joe Schmutzler, Co-Chair of the WHPA's FDD Committee and Director of Global Utility Relations at Transformative Wave, said "FDD can help improve the reliability of energy savings and improve the customer's HVAC experience. There is an opportunity to improve HVAC maintenance programs by leveraging these technologies."

[Read more >>](#)

## WHPA by the Numbers *A Reflection of 2016*

- Produced **17 work products** that support California HVAC energy efficiency programs
- Held **156 meetings** attended by **1,356 volunteer** organizations (cumulatively)
- **21 new member organizations** approved
- **19,766 visits** to the WHPA website
- **1 excellent 2016**, and amazing start to 2017, thanks to the dedication of the WHPA membership

## WE&T Working Group Digs Deep on Complexities of "Comparable Training"

The phrase "comparable training" has caused confusion and disagreement since it was first used in the May 2014 Don Vial Center (DVC) Report: [Workforce Issues and Energy Efficiency Programs: A Plan for California's Utilities](#).

What's all the fuss about? Well, this simple phrase matters a lot because this report suggests that in order to participate in a utility incentive program, technicians should have a "2-year degree, completion of an apprentice program, or proof of comparable training and experience."

With the high stakes of IOU program dollars and the ambiguity of the phrase "comparable training", the IOUs asked the WHPA to provide further definition to the term. A definition of this term is important to the IOUs because of the relevance in defining eligibility criteria in ratepayer energy efficiency programs.

The Workforce Education and Training (WE&T) Committee established a Working Group in 2016 to provide valuable stakeholder feedback on this contentious issue of what is comparable training, with 14 voting members and another 20 or so members of the WE&T Committee. Pepper Hunziker of Tre'Laine Associates was Chair of the Working Group.

After lively discussion in a series of working group meetings with a broad spectrum of

stakeholder input, the Working Group concluded that it was unable to define comparable training.

In presenting the Work Product to the Executive Committee, Pepper stated “The primary challenge the working group faced was that there were no defining and/or measurable criteria for ‘comparable’ that could be used as a framework.”

Pepper Hunziker further explained to the Executive Committee, “As the DVC report examples were analyzed, the Working Group identified inconsistencies and irregularities. The group agreed that the examples existed within a greater HVAC WE&T spectrum, which is represented as a career lattice.”

The working group’s written report addressed a more specific issue: how WE&T support can aid in ensuring successful program implementation. Consequently, the Work Product adopted by the Executive Committee articulated an alternative recommendation that includes eligibility requirements, employer support components, and targeted training that would align directly with specific program’s performance metrics.

The [\*WHPA Recommendations to Inform Comparable Training\*](#) Work Product was adopted by the EC at the January 2017 meeting. These recommendations provide a framework for IOUs to develop HVAC contractor and technician eligibility requirements for current and future programs, helping to meet the responsible contractor mandate in SB350.

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## Committee Helps Convey the Value of Quality Maintenance

The Commercial Quality Maintenance (CQM) Committee, which has developed many highly technical documents over the years, broke new ground with a [\*new Work Product\*](#) aimed at the sales process.

Their goal is to help contractors establish a conversation with building owners about signing up for a maintenance program – and paying a premium for a quality program. Don Langston, owner of Aire Rite AC & Refrigeration and Chair of the CQM Committee, came up with the idea for the Working Group.

*“This Work Product is Version 1 of a discovery process between the contractor and building owner, moving from a price-only discussion. Our goal is to come up with some very specific maintenance-related targets so that we can go back to the customer a year from now and say ‘Hey, how did we do?’ Touch points with customers are essential for an ongoing professional relationship.”*

Janet Peterson, Senior Vice President of XCSpec and a member of the CQM Committee, sees the work as very important: “70% of the HVAC Roof Top Units are not under a maintenance contract. Customers are often hesitant to commit the funds for a multi-year contract since they do not understand the value proposition associated with HVAC maintenance.”

“The goal of this work product is aid the service organization during the upfront customer interviewing to discern a strategy that can result in signing a maintenance contract. This includes three key objectives: understanding their key maintenance objectives, aligning their objectives to their budget and defining mutually agreed upon metrics for performance against the agreed upon objectives.”

Janet continues, “The point about metrics is a very key point. There are multiple instances where a service organization has been doing a great job for the last 3 years – and NOT disturbing the customer – and then the customer does not continue the contract. Why? Since they had not been disturbed with any HVAC issues or customer complaints, they assume HVAC systems do not require attention. So, having clear metrics provides transparency to the customers and helps also helps educate them on the benefits of quality maintenance.”

The *Standard 180 Performance Objectives to Value Proposition Interview Process* document

will be further developed in one of three CQM Working Groups in 2017. The other Working Groups are Field Data Specifications and User Manual (Technical).

The Western HVAC Performance Alliance was established in 2009. About 231 organizations in 26 stakeholder categories are working together to help transform from the residential and small commercial HVAC industry to ensure that technology, equipment, installation and maintenance are of the highest quality to promote energy efficiency and peak load reduction. In this role the WHPA provides input to California Investor-Owned Utilities. For more information, contact [info@performancealliance.org](mailto:info@performancealliance.org).

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