



**CQM Standard 180 User Guide Customer Communications Working Group  
Wednesday May 2, 2017 Meeting Notes**

**Call to Order**

The meeting was called to order at 9:02 am PDT by Jan Peterson, XCSpec and Chair.

**Roll Call**

The Chair considered one member of each organization to be a voting member for this working group. 3 of 5 voting members in attendance would constitute a quorum. 3 voting members, 0 non-voting members, 0 guests and 1 staff were present for a total of 4 attendees.

P = Present at meeting A = Absent from meeting; if proxy has been assigned it will be noted below. Although Voting Members have been designated by Staff, this group acts primarily by consensus.				
<b>CQM User Guide Working Group Voting Members</b>				
Aire Rite AC & Refrigeration	Don	Langston	Contractor (Nonresidential)	
Charles Segerstrom, Energy Efficiency Consulting	Charles	Segerstrom	Energy Efficiency Program Consultant	P
Richard Danks Consulting	Richard	Danks	Other Stakeholder	A
Tre' Laine Associates	Pepper	Hunziker	Energy Efficiency Program Consultant	P
XCSpec	Janet	Peterson	Controls (Manufacturer or Distributor)	P
<b>CQM User Guide Working Group Non-Voting Members</b>				
<b>CQM User Guide Working Group Non-Voting Guests</b>				
B2B Sales Excellence**	James	Graening+		
<b>WHPA Staff (Non-Voting)</b>				
BBI (Better Buildings Inc.)	Mark	Lowry	WHPA Executive Advisor/BBI COO	
BNB Consulting/WHPA Staff	Bob	Sundberg	Energy Efficiency Program Consultant	P (scribe)

*\*\* Organization is Not a Member of the WHPA; + Individual is NOT Registered with the WHPA; <sup>(P)</sup> after last name = Member/Registrant is Pending Approval from the WHPA Executive Committee  
To avoid repetition, the name of the member organization will not be repeated in the body of the minutes past the first identification with the name of the representative participant.*

**Welcoming and Member Introductions**

No new members or guests.

**Approve Previous Meeting Draft Notes**

This was the first working group meeting with core members. Previously, Jan Peterson, Don Langston and Bob Sundberg had held planning conference calls.

**ACTION Items**

None.

**New Business – Jan Peterson**



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<b>AGENDA</b>		
<b>Topic</b>	<b>Discussion Leader</b>	<b>Desired Outcome</b>
Welcome, Roll Call, Member Introduction, Approve Past Meeting Notes, Review Action Items, New Business, Meeting Agenda	Chair, WHPA Staff	Record attendees, welcome any new members, approve previous meeting minutes, review status of any open Action items, planned agenda and bring up any new business items for the WG to consider addressing.
WG goals, and objectives	Don Langston, Jan Peterson	Decide on overall strategic goal and seek input on more specific objectives. Complete a “goal statement” for the WG.
Timeline, roadmap for 2017 meeting topics	Don Langston, Jan Peterson	Establish a timeline, roadmap for WG meetings
Working Group membership and demographics	Don Langston, Jan Peterson	Identify key member categories for recruitment
WG 2017 work product	Don Langston, Jan Peterson	Establish a target work product for 2017
Confirm next meeting date/time, assign actions and proposed agenda and adjourn.	Don Langston, WHPA Staff	Clear understanding of member responsibilities for the next meeting. Next meeting date/time established.

**Working Group Goal Statement and Roadmap – Jan Peterson**

Jan Peterson, XCSpec and WG Chair – proposed that “strategic objectives” were longer term goals for a complete work product which might not be completed by the end of the year. “Goals” were shorter term milestones with more specific deliverables of portions of a final work product.

Forbes, 2013

- A **goal** is a broad primary outcome.
  - A **strategy** is the approach you take to achieve a goal.
  - An **objective** is a measurable step you take to achieve a strategy.
  - A **tactic** is a tool you use in pursuing an objective associated with a strategy.
- (<https://www.forbes.com/sites/mikalbelicove/2013/09/27/understanding-goals-strategies-objectives-and-tactics-in-the-age-of-social/#48a25a2d4c79>)

Jan Peterson proposed:

Primary goal: After the 3-year utility program incentives are over, the customer will perceive the value of quality maintenance and continue with the maintenance contract without incentives.

Proposed definitions:

Contractor Definition: The HVAC Service organization that would be performing on a maintenance contract.

Decision Marker Definition:

Approves the contract.

This may involve more than one person - e.g. may involve the building/property owner and technical building manager.

Pepper Hunziker, Tre’ Laine Associates – she thought of the user manual overall and the outcome work product of this working group (WG) to be providing tools and strategies to help the customer decide to extend Standard 180 based practices beyond expiration of any utility program incentives. She asked, what was this new work product specifically



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intended to accomplish? She thought this next phase work product should draw on earlier CQM working group work products and leverage those accomplishments rather than start from the beginning, again. She thought the WG needed to develop a general “mission statement” of what this intended work product would provide.

Jan Peterson – agreed that a mission statement could be developed to convey that the WG work product would be a document intended to aid the contractor’s communication with their client about the expected value delivered by Standard 180 based quality maintenance.

Charles Segerstrom, Energy Efficiency Consulting – he knew that the communication piece about developing goals was important. But, he was most interested that they also include the end of the process reporting pieces for full circle communications. That the goal metrics developed would be tracked for trends and reported on at established intervals. How to communicate the benefits of quality maintenance (QM) with reporting in mind according to the customer’s goals to accomplish market transformation.

Bob Sundberg, WHPA staff – Charles had just identified the second of two key portions of a full process for customer communications (CC). The first part of the CC process did involve establishing customer maintenance program level goals with metrics that could be tracked for status and trending. The second part of the CC process, which Charles had just mentioned, involved reporting to customers on those goals and establishing regular intervals to review the findings and adjust or revise the maintenance program. That review of goals and metrics was intended to identify and deliver evidence of value which the maintenance program delivered. The Interview work product developed by the full CQM Committee in 2016 was the foundation for establishing those goals, some which the owner might not have considered.

Jan Peterson – accepted an action item to develop a one sentence mission statement for this section of the WG work product.

**ACTION:** Jan Peterson would develop a one sentence mission statement for this section of the customer communications working group work product.

Jan Peterson proposed deliverables for their 2017 work product. They could develop the following tools.

1. The first deliverable for this WG would be development of a customer questionnaire. A format to guide customers and their service provider to consider issues the customer was worried about and some they might not have considered. She thought they would need to have someone role-model a customer and another person role-model the contractor/service provider.
2. Second deliverable would be a customer qualification portion of the questionnaire and a matrix of extrapolated ROI, not attempting to measure the HVAC system efficiency improvement. ROI elements like improvement in IAQ and tenant/occupant satisfaction, avoidance of capital equipment replacement costs, improvement in equipment reliability through reduced unscheduled/emergency service calls and reduction in HVAC related energy costs. James Graening, in a previous meeting, had suggested that a customer really needed to be “qualified” to determine whether they were interested in the likely benefits of more comprehensive maintenance or just driven and preoccupied with obtaining a lowest bid. That there was alignment between the potential budget, proposed QM contract costs and what the customer was prepared to spend.
3. Third deliverable would be development of goal metrics for commonly established maintenance program goals. Rick Danks had provided a presentation which highlighted some metrics like work order trending and backlog and a ratio between planned and unplanned work orders. That was an area that most contractors were very familiar with already. Equipment uptime could be a metric to help measure equipment reliability. The maintenance cost per unit or capacity could also be compared in a ratio to equipment replacement cost avoided.

Jan Peterson then asked Pepper and Charles for feedback on this proposed scope of work for 2017.



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Pepper Hunziker, Tre' Laine Associates – she thought it was a reasonable set of deliverables. She was trying to see whether they could circle back to review and leverage work products already developed by previous CQM working groups. She also asked for a better explanation for what Jan had meant earlier by the term “role-modeling.”

Jan Peterson – Don Langston had first used this term in an earlier meeting. She understood Don to mean the WG should talk directly with actual facility managers and owners who put maintenance contracts together and had to implement them. That way the WG could confirm what kinds of “pain points” were real and which were key common ones like equipment uptime and reliability.

Bob Sundberg, WHPA staff – asked Jan whether by “role-modeling” or “role-playing” she’d meant to invite end users or actual facility managers to WG meetings to discuss their key “pain points” and maintenance goals or to have them help develop a script document that could serve as an example of a goal setting discussion or interview with a service provider or a specific market segment or building type? Facility managers for 50 restaurant locations or a university campus or tenant/leased office space such as the market segments identified in the CQM Standard 180 User Guide WG 2016 work product? A simulated dialogue in writing?

Jan Peterson – thought the WG could flesh out some of the core issues and concerns common to almost every type of facility or market segment. At the end of the questionnaire, there could be building/facility/segment specific questions suggested as well. Restaurants, for instance, might be far more concerned about building pressurization issues than other building types.

Pepper Hunziker – suggested they examine the work products already developed by the User Guide WG to take advantage of the work already completed in areas like decision-makers, pain points, suggested tools and templates. That might help identify who were key decision-makers from the different market segments who might be good subjects to help develop this questionnaire. That work could be merged with the CQM Committee Interview work product which developed key question areas necessary for program goal development. They could reference both earlier source documents within the current work product.

All WHPA committee and working group work products listed chronologically:  
<http://www.performancealliance.org/WHPAWorkProducts/tabid/440/Default.aspx>

Link to the final 2016 report/work product of the CQM Standard 180 User Guide Working Group:  
<http://www.performancealliance.org/Portals/4/Work%20Product/Approved%20WHPA%20Work%20Product%20-%20CQM%20STD%20180%20User%20Guide%20Working%20Group%202016%20Final%20Report%201-18-17.pdf>

Jan Peterson – a near term objective would be to find somebody who could role-model the customer perspective and then candidates for the contractor perspective. Then, actual development of the questionnaire, the list of questions from which the contractor and owner would develop program goals.

Bob Sundberg, WHPA staff – brought up a copy of the CQM STD 180 User Guide WG 2016 work product. The group walked through the document for Jan’s benefit, since she’d not participated on this WG. That work product sought to identify decision-makers, primary maintenance related issues and pain points, possible benefits, obstacles to adopting more comprehensive maintenance and possible resources and tools to help resolve for the four focused market segments/building types. Bob agreed that the next step would be to recruit contractors and facility managers/owners for the selected types of facilities or market segments. He emailed Jan a copy of the work product for further study.

Pepper Hunziker – walked Jan through more of the User Guide WG work product to show how common characteristics and issues could help identify key core questions for the questionnaire.



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Jan Peterson – thought that the earlier User Guide work product could be expanded by providing a questionnaire for each market segment, provide examples of suggested goals and metrics and of extrapolated ROI. The work Rick Danks had referred to at earlier meetings regarding program metrics could fit in well – number of truck rolls with a ration of scheduled maintenance vs. unscheduled repairs/emergency service calls and such without getting into meters and energy use/savings. The small building owner occupied market segment would probably be the easiest one to tackle first. The owner would be aware of all costs of operations and issues directly.

**Working Group Demographics and recruitment – Jan Peterson**

Bob Sundberg, WHPA staff – he thought the first real challenge for this group was how to get participation of stakeholders, both facility managers/owners and contractors who served that market segment, so the questionnaire they developed was real. And, a single stakeholder would, understandably, have a limited perspective focused on their specific circumstances. Two or more representatives would provide a broader range of responses. Locating an “owner occupied” representative could be difficult. Folks like Tom Boyd, Irvine Properties, and Wendy Gallo, Little Caesar’s, both managed many locations. He noted that BOMA was not currently a member of the WHPA. That association represented thousands of building owners and managers and had several CA offices. BOMA might be a source for owner occupied market segment representatives.

WHPA member categories related to facilities and property management:

- Other Stakeholder
- Owner/Facility/Property Management Association
- Owner/Facility Management/Property Management Company

Building Owners, Managers Association (BOMA) was not currently a member of WHPA.

<http://www.boma.org/Pages/default.aspx>

The Building Owners and Managers Association (BOMA) International is a federation of 90 BOMA U.S. associations and 18 international affiliates. Founded in 1907, BOMA represents the owners and managers of all commercial property types including nearly 10.5 billion square feet of U.S. office space that supports 1.7 million jobs and contributes \$234.9 billion to the U.S. GDP. Its mission is to advance a vibrant commercial real estate industry through advocacy, influence and knowledge.

**California**

▶ BOMA/Silicon Valley
▶ BOMA/San Francisco
▶ BOMA/San Diego
▶ BOMA/Sacramento
▶ BOMA/Oakland-East Bay
▶ BOMA/Orange County
▶ BOMA/Greater Los Angeles
▶ BOMA/Inland Empire

<http://www.boma.org/industry-issues/energy/Pages/Energy-Efficiency-in-Commercial-Buildings.aspx>

<http://www.boma.org/industry-issues/contact-advocacy/Pages/default.aspx>

Jan Peterson – thought that Don Langston and Denny Mann or others in the contractor community might know of building owners who might be willing to participate and provide that owners perspective if their obligation to participate was limited to WG interviews with them. Maybe two to three hours of role-playing sessions this year.



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Pepper Hunziker – she suggested they check with Shayne Holderby or Todd Van Osdol, IOU program implementers, if they knew of any contractors or their clients who might be willing to participate. The WG could also send an email to the whole CQM Committee to see if members would recommend participants for the role-playing.

Jan Peterson – offered to draft an email requesting committee members suggest possible participants for their interview role-playing sessions. Questions for a questionnaire intended to help a contractor ask the right questions of their prospective or current client. To make sure questions touched on energy, IAQ, HVAC operations and equipment reliability, maintenance vs. repair or replacement costs. The role-playing will involve a building owner being asked a series of questions by their contractor. The owner will be asked to have two or three things in mind about the building operation which bother them, pain points. This will help test whether the series of suggested questions help uncover their actual concerns and issues. Jan also thought it might work better to conduct the interview with more than one owner and building type to see where they could capture questions of a more general nature rather than going into great depth on only one type of building or facility manager/owner.

**ACTION:** Jan Peterson, XCSpec, offered to draft an email to the full CQM Committee to solicit help in locating contractor and small building owner occupied participants to help the WG develop their questionnaire. The draft would be sent to Pepper Hunziker and Bob Sundberg for input, copying Don Langston, before being finalized and sent onto Bob Sundberg for distribution out to the full CQM Committee.

<b>Closing Comments/Adjournment</b>
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Jan Peterson Chair –

The next meeting was not scheduled. The WG would wait for participation response from a request sent to the full CQM Committee before determining when to next meet.

The meeting was adjourned at 10:13 am PDT.

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<b>Action Items and Key Decisions</b>
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May 2 **ACTION:** Jan Peterson would develop a one sentence mission statement for this section of the customer communications working group work product.

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