



## 1. Vision

The Western HVAC Performance Alliance (WHPA) is an organization that will serve as a credible, reliable, influential, and effective resource for a broad-based community of HVAC stakeholders who have joined forces to transform the marketplace focused on the energy efficiency, environmental quality, and sustainability goals of California. Through stakeholder collaboration a united HVAC industry has the power to impact the present and the future.

**Commented [WW1]:** Chartering Committee approved by general consensus vote 12-6-17.  
HSES Committee generally agreed 12-8-17.

## 2. Mission

The WHPA will work as a guiding light for California stakeholders to educate and support present and future HVAC energy efficiency initiatives to benefit consumers. The organization will facilitate communication and action among a wide set of market actors through workforce education & training, emerging technologies, and industry-vetted HVAC programs.

**Commented [WW2]:** Chartering Committee approved by general consensus vote 12-6-17.  
On 12-8-17, the HSES Committee requested Chartering Committee review of suggested edits to the phrase “industry-vetted HVAC programs” to clarify that “programs” refers to all HVAC programs and activities rather than give the perception of just IOU programs. Mel Johnson also suggest that the HSES notes capture related HSES discussion for EC review on the topic in lieu of further Chartering Committee adjustment.

## 3. Goals

### 3.1 Overarching Goals

The WHPA will ~~1) develop and continuously evolve recommendations;~~ 1) identify specific actions, milestones, schedules, and metrics for measuring progress on the near-term, mid-term, and long-term goals related to HVAC energy efficiency; 2) interact with market actors and end users to improve energy performance of HVAC systems; ~~3) develop and continuously evolve recommendations;~~ 4) provide education and support of actions to ~~increase compliance, and~~ integrate compliance into industry practices in a simple and understandable manner ~~; and 5) act as an organization, we will to continually change with the market and with market forces.~~

**Commented [WW3]:** Following vetting of the Overarching Goals (as redlined), the Chartering Committee generally agreed 12-6-17 that since specific goal definition beyond the Vision and Mission are not needed for the Bylaws and Articles of Incorporation, further Goal development work is on hold until the needed incorporation documents are finalized. In the interim, Chartering/HSES Committee input on the specific Goals, particularly for the Compliance Strategy placeholder bullets should be emailed to WHPA Staff ([wendy.worrell@infoplast.com](mailto:wendy.worrell@infoplast.com)) for tracking. Detailed Goal vetting/finalization is expected at the Q1, 2018 In-Person meeting with whoever is invited as leadership of the organization.

The goals of the WHPA are organized into the following categories with understanding that strategies and sub-strategies will be developed and evolved over time as needed to meet those goals:

- [Energy Efficiency Program Goals](#)
- [Emerging Technology Development Goals](#)
- [HVAC Industry Goals](#)
- [HVAC Community Engagement Goals](#)
- [Consumer Outreach Goals](#)
- [Public Policy Goals](#)

### 3.2 HVAC Energy Efficiency Program Goals

- Strategy 3.2.1 – Through effective communication and collaboration, utilize expert knowledge and connections to amplify the impact of energy efficiency programs administered by utilities, local governments and other “third party implementers.”
- Strategy 3.2.2 – Provide counsel to and take input from utilities, efficiency program designers, implementers, and evaluators for the purpose of curbing energy waste.
- Strategy 3.2.3 – Propose plans to advance statewide, regional and potentially national HVAC efficiency program approaches without discouraging or stifling locally-targeted product or process innovation.



- Strategy 3.2.4 – Continuously review the design and implementation of programs being administered in support of the HVAC energy efficiency and propose new program ideas.
- Strategy 3.2.5 – Recommend qualifications and guidelines for HVAC program implementers, trainers and educators.

Commented [WW4]: Overlap with Strategy 3.5.2

### 3.3 Emerging Technology Development Goals

- Strategy 3.3.1 – Identify needed emerging energy efficiency technologies and provide insight, guidance and prioritization to such technologies that become identified for development or commercialization.
- Strategy 3.3.2 – Envision tools and technologies that would help transform the HVAC market and seek their development in both public and private research laboratories.
- Strategy 3.3.3 – Assist with the field testing of commercially viable tools, equipment and processes, and report results.
- Strategy 3.3.4 – INSERT COMPLIANCE goal relative to emerging technology

Commented [WW5]: Committee/Bob Barks' development assistance is requested here.

### 3.4 HVAC Industry Goals

- Strategy 3.4.1 – Work with other organizations to identify best practices for HVAC systems.
- Strategy 3.4.2 – Recommend strategies to transform the residential and small commercial HVAC market so that technology, equipment, installation and maintenance are of the highest quality in order to achieve energy efficiency and peak load reduction.
- Strategy 3.4.3 – Take a leadership role in advocating for the reduction of inefficient energy use due to improperly installed, operated, serviced, and maintained unitary HVAC systems and other HVAC systems serving the residential and non-residential markets.
- Strategy 3.4.4 – Leverage industry expert knowledge and connections to promote awareness among HVAC industry personnel of the impact that their products, services and labor have on energy use—both good and bad—and the significant business and occupational opportunities that exist for those who use their knowledge and skills to bring about energy efficiency.
- Strategy 3.4.5 – Pose tactics to make the HVAC industry—and HVAC energy efficiency—more attractive to future HVAC workers, and establish outreach programs in support thereof.
- Strategy 3.4.6 – INSERT COMPLIANCE goal relative to HVAC industry as an entity

Commented [JJ6]: Overlap with strategy 3.5.3

Commented [WW7]: Committee/Bob Barks' development assistance is requested here.

### 3.5 HVAC Community Engagement Goals

- Strategy 3.5.1 – Cultivate dialogue and closer working relationships within all segments of the HVAC market, creating a forum for open dialog among what have historically been disparate interests often working against or independent of one another.
- Strategy 3.5.2 – Solicit and summarize opinions on issues relevant to energy efficiency programs, as a means of improving the effectiveness of these programs.
- Strategy 3.5.3 – Seek out, document, and deploy information about best practices in HVAC installation and maintenance, business practice, engineering education, training, certifications, code enforcement, distribution, and manufacturing, such that this knowledge is shared within all facets of the market to support energy efficiency goals.
- Strategy 3.5.4 – Generate dialogue and closer working relationships among market actors who also promote HVAC efficiency by being bidirectional and transparent, both influencing and being influenced by other stakeholder groups.
- Strategy 3.5.5 – Take guidance from and provide guidance to regulators and others engaged in market assessment, evaluation, measurement and verification about the potential for and actual results of HVAC energy efficiency programs.
- Strategy 3.5.6 – INSERT COMPLIANCE goal relative to community engagement

Commented [WW8]: Overlap with Strategy 3.2.4

Commented [JJ9]: Overlap with Strategy 3.4.1

Commented [WW10]: Committee/Bob Barks' development assistance is requested here.



### 3.6 Consumer Outreach Goals

- Strategy 3.6.1 – Help consumers, both individually and in organizations including hospitals and dwellings, process and organize information ~~for consumers~~ to help meet their needs.
- Strategy 3.6.2 – ~~Provide Outreach~~ and education of consumers ~~and in~~ support of efforts to provide the consumer with the most energy efficient, technologically- appropriate systems to serve their ~~needs for their~~ comfort and health needs.
- Strategy 3.6.3 – ~~Identify and enact processes to develop a~~ We need a more informed and educated consumer, as well as the workforce necessary to make this happen drive needed market transformation toward achievement of compliance, energy savings, and health and safety goals.
- Strategy 3.6.4 – Encourage WHPA Members to promote energy efficiency in marketing and sales efforts whenever possible by creating new programs, supporting existing programs, and measuring the success of such promotional efforts.
- Strategy 3.6.5 – Provide feedback about market conditions and suggest approaches for creating desire among residential and non-residential consumers through individual and collective marketing, communications and sales efforts for efficient HVAC equipment, and high-quality installation, service and maintenance.
- Strategy 3.6.6 – Encourage HVAC industry participation in marketing, communications and sales efforts focused on HVAC issues such as quality installation, quality maintenance, installer/technician certification, and contractor accreditation.
- Strategy 3.6.7 – Assist in identifying feedback mechanisms for residential and non-residential consumers who directly or indirectly participate in HVAC programs and/or adopt high quality, high efficiency HVAC products and services.
- Strategy 3.6.8 – ~~INSERT COMPLIANCE~~ goal relative to consumer outreach.

**Commented [WW11]:** What needs? HVAC efficiency? HVAC as part of whole building performance?

**Commented [WW12]:** Should safety be added here too? (“... to serve their comfort, health, and safety needs.”)

### 3.7 Public Policy Goals

- Strategy 3.6.1 – Provide an environment that enables All participating stakeholders to receive who are participating should receive benefits from engagement.
- Strategy 3.6.2 – Assist stakeholders, utilities, policymakers and others to implement, assess, prioritize, build consensus around, and continuously improve relevant guidelines, regulations and legislation.
- Strategy 3.6.3 – ~~INSERT COMPLIANCE~~ goal relative to public policy, including comment on Title 24, and ~~also on teaching how to use~~ compliance tools’ use education.

**Commented [WW13]:** See Strategy 3.6.3. Committee/Bob Barks’ development assistance is also requested here.

**Commented [WW14]:** Committee/Bob Barks’ development assistance is requested here.