



Western HVAC Performance Alliance Inc. (WHPA)

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Group 1: (a) HVACR Community Engagement and (b) Consumer Outreach

WHPA SMART Goal Break Out Group Instructions and Example

GENERAL OVERVIEW

For 2018 and beyond, the governing Board of Directors established WHPA [goals and strategies](#) focused on eight (8) target areas. WHPA Members attending the 11-15-2018 WHPA Annual In-Person Membership Meeting are asked to suggest prioritizations of those goals for the coming year to help inform WHPA Leadership in their formulation of a 3-Year Goal Development Plan for 2019 – 2021.

- On a self-selected basis, meeting attendees will participate in one (1) of six (6) break out groups—four (4) groups focused on one (1) goal set and two (2) groups focused on two (2) goal sets.
- Each group has two (2) hours for discussion (plus time during the preceding lunch hour if so desired).
- Each group will have a scribe for capture of the task report out content and any supporting notes. (Capture may be completed on the provided template [printed and on the USB] at the table or on the available flip chart.)
- Each group will designate a Report-Out Presenter to provide the group's quick report out upon completion of the break out session.
- Each group will turn their report out notes into WHPA Staff following the report out session.

PRIORITIZATION INSTRUCTIONS

Factoring in the morning meeting content, prioritize the following goal strategies by suggesting timeline(s) for each strategy as well as high-level recommendation(s) for the type(s) of stakeholder engagement and possible deliverable(s) for each strategy.

The WHPA Survey Results, Overall Goals and Strategies list, and Stakeholder Engagement Methods clarification are provided for reference.

See General Template EXAMPLE (for all Groups) on page 2.

EXAMPLE (for all Groups)

| Strategy Referenced Goal Strategy on Break Out Group Template | Possible Outcome & Deliverable(s) What is the outcome of stakeholder engagement? Which parties are involved? Who benefits? What resources are needed? | Recommended Stakeholder Engagement Method(s) How will stakeholders engage to bring this about? (see <i>Stakeholder Engagement Methods list</i>) | Suggested Frequency/Duration How often does engagement occur and how many times? (ex: <i>one-time bi-monthly, quarterly, annually, etcetera</i>) | Suggested Calendar Timeline How should this be prioritized in the next 3 years? 2019 Q1, Q2, Q3, Q4 2020 Q1, Q2, Q3, Q4 2021 Q1, Q2, Q3, Q4 |
|---|---|--|--|--|
| <p><u>Example Consumer Outreach Strategy 5.3</u></p> <p>Identify and enact processes to develop a more informed and educated consumer, as well as the workforce necessary to drive needed market transformation toward achievement of Compliance, Energy Savings, Health and Safety Goals.</p> | <p>Ex. Outcome(s):</p> <p>Cultivate a beneficial dialogue that seeks to inform, educate and engage Consumers in Health & Safety, Compliance (Code & Standards) and Energy Savings outcomes.</p> <p>Ex. Deliverable(s):</p> <ul style="list-style-type: none"> • Increase consumer understanding about Health & Safety through the lens of HVACR. • Increase consumer awareness about HVACR permitting, performance installation, cost and energy savings. • Develop Consumer Uptake of importance of Compliance (Codes & Standards) • Increase Engagement between HVACR Community & Consumers, Enforcement and Regulator Representatives. | <p>Ex. Suggested Engagement:</p> <ul style="list-style-type: none"> • Form Exploratory Working Group/Committee • Seek SME Input • Conduct Meet-n-Greets • Host Educational Webinars • Other? | <p>Ex. Frequency:</p> <ul style="list-style-type: none"> • Exploratory Working Group/Committee has monthly conference calls (est. total of 9-12 hour long meetings) • (1) Meet-n-Greet in SoCal and (1) Meet-n-Greet in NorCal. • (1) Educational Webinar per qtr. | <p>Ex. Calendar:</p> <p>Prioritize in 2019-Q1, Q2, Q3, Q4</p> <p>Re-evaluate Q4 2019</p> |