



2019–2025 ASHRAE Strategic Plan Midterm Update

Revised February 9, 2023



Prepared by ASHRAE Planning Committee
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INTRODUCTION

This plan, developed by the ASHRAE Planning Committee in collaboration with the Board of Directors, will guide the work of the Society during the five-year period from 2019-2024. It was developed during 2018-2019 through a process initiated by a stakeholder engagement exercise involving members of ASHRAE and key industry organizations who gave their views on ASHRAE's position in the industry and its perceived strengths and challenges. With facilitation by the Planning Committee, the Board then conducted a brainstorming session to develop preliminary objectives and initiatives. These addressed both outward-facing issues affecting the industry and society as well as inward-facing issues related to the needs of ASHRAE members and organizational efficiency. The final plan was drafted by the Planning Committee with Board oversight following multiple reviews including review by regional leadership teams. The final phase of development was preparation of implementation and tracking procedures, roll-out plans and budget estimates. Communication of the new plan to councils and committees began in Spring 2019 with formal implementation beginning in July 2019.

2021 MIDTERM UPDATE AND 1-YEAR EXTENSION

In Spring 2021, the Board of Directors approved a midterm update and one-year extension of the 2019-2024 Strategic Plan. This update was recommended by the 2020-2021 Planning Committee due to recent events that altered how the Society completes its work and serves the industry. Revisions to the 2019-2024 Strategic Plan include lessons learned during the COVID-19 pandemic as well as rebooted/restarted initiatives to redirect resources.

Initiatives and goals reviewed were addressed in a way that would allow ASHRAE councils and committees to make significant traction with the already assigned tasks while considering any work in progress or already completed. Feedback from the Planning Committee liaisons assigned to each of the Presidential Ad Hocs was also taken into consideration to ensure efforts regarding the streamlining initiatives were addressed.

2023 REVISION

The Task Force for Building Decarbonization (TFBD) along with the ASHRAE Planning Committee reviewed the current strategic plan midterm update to determine how the plan could be revised to include a greater decarbonization focus. Revisions to the plan as approved by the ASHRAE Board of Directors are evidence of those efforts and an ever-changing industry.

MISSION, VISION AND VALUES

As part of the Strategic Plan development process, the Planning Committee recommended that the Mission and Vision statements be revised to reflect ASHRAE's current work and aspirations more clearly. No changes were recommended to ASHRAE's Core Values.

Mission

To serve humanity by advancing the arts and sciences of heating, ventilation, air conditioning, refrigeration and their allied fields.

Vision

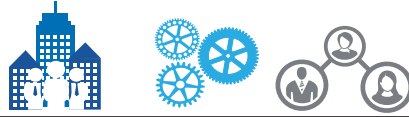
A healthy and sustainable built environment for all.

Values

- Excellence
- Integrity
- Volunteerism
- Commitment
- Collaboration
- Diversity

GOALS AND OBJECTIVES

ASHRAE's leadership has identified **three goals**: to advance the industry, provide value to ASHRAE members and prepare the Society for the future and **objectives** that support each goal. **Four initiatives** have been identified to respond to these goals and objectives as shown in the table below. The initiatives are described in detail on the next page (p. 7).

GOAL 1 Position ASHRAE as an Essential Knowledge Resource for a Sustainable, High-Performance Built Environment	
OBJECTIVES	INITIATIVES
a. Utilize a holistic approach to ASHRAE's offerings and activities to drive positive economic, environmental and social impact through innovation in building design and operations	
b. Expand capabilities globally to create, aggregate and disseminate essential information and knowledge focusing on emerging market trends and transformative approaches	
GOAL 2 Maximize Member Value and Engagement	
OBJECTIVES	INITIATIVES
a. Infuse enthusiasm, vitality and diversity throughout ASHRAE events and services	
b. Expand the impact of collaboration and partnerships with industry organizations, universities and government agencies	
c. Leverage technology to increase member engagement, awareness and value	
GOAL 3 Optimize ASHRAE's Organizational Structure to Maximize Performance	
OBJECTIVES	INITIATIVES
a. Prototype and launch new approaches that will increase ASHRAE's relevance and speed to market for key offerings	
b. Optimize ASHRAE's organizational systems and structures to increase capacity, efficiency and effectiveness	
c. Cultivate industry and member philanthropy to extend ASHRAE's impact and reach	

KEY



Resiliency and
Decarbonization
in Buildings



Indoor
Environmental
Quality



Organizational
Streamlining



Improve Chapter
Engagement, Capacity
and Support

STRATEGIC PLAN AREAS AND INITIATIVES

Initiatives provide a focus for the Society to drive advancement, create value, and improve efficiency.

Initiative Area: Built Environment of the Future | Building Decarbonization

1 RESILIENCY AND DECARBONIZATION IN BUILDINGS



The pace of change in building design, development, construction, and operation is increasing rapidly, driven by increasing global challenges associated with increasing building-related GHG emissions. By 2030, all new buildings must be built to achieve net zero operational GHG life cycle emissions, with all existing buildings retrofitted to net zero emissions standards by 2050. ASHRAE must work with building industry partners to accelerate innovation, define global best practices, and develop technical guidance, standards, training, and other tools to support building decarbonization while assuring high levels of indoor environmental quality, sustainability, and resilience.

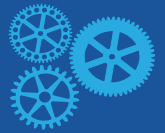
2 INDOOR ENVIRONMENTAL QUALITY



The indoor environment is increasingly recognized as the leading priority for built environment, with implications extending beyond simple acceptability of indoor conditions to its influence on productivity, learning and health. The indoor environment of the future identifies and optimizes interactions among air quality, thermal comfort, lighting and acoustics, based on a firm understanding of implications for occupants' health and wellness. ASHRAE convenes and collaborates with experts and stakeholders across the industry to engage in discussion and exploration of this topic to accelerate collective knowledge in the field. This initiative aims to elevate ASHRAE's role in facilitating this discussion, generating thought leadership and promoting understanding of indoor environmental quality (IEQ) among practitioners.

Initiative Area: Future of ASHRAE

3 ORGANIZATIONAL STREAMLINING



ASHRAE is a large and complex organization with hundreds of technical, standards and managerial committees, supported by a rich network of leaders and subject matter experts. ASHRAE will reach its potential for leadership and influence through an organizational structure that eliminates redundancy, has flexibility to adapt to regional differences and allocates valued time and resources to the most impactful pursuits. This initiative intends to improve internal governance, volunteer and staffing structures to ensure a strong connection across the societal organization and its chapters around the globe.

4 IMPROVE CHAPTER ENGAGEMENT, CAPACITY and SUPPORT



ASHRAE must evaluate and develop methods to better engage chapters, regions and the members they serve in an integrated way. A more supportive and proactive strategy for chapter and regional oversight will minimize variability and ensure that all ASHRAE members experience a strong and valuable connection to the local and societal component.



BACKGROUND

Eliminating GHG emissions from the built environment is essential to addressing global climate change's negative human and environmental impacts.

ASHRAE must work with building industry partners to accelerate innovation, define global best practices, and develop technical guidance, standards, training, and other tools to support building decarbonization while assuring high levels of indoor environmental quality, sustainability, and resilience.

Table 1 provides more detail:

TABLE 1

BUILT ENVIRONMENT OF THE FUTURE Building Decarbonization	
Resources	Funded through ASHRAE research and publications budgets along with ASHRAE reserve funds. The potential exists for funding partnerships with other foundations, government entities, and non-governmental organizations.
Benefits	To Humanity: Help reduce building greenhouse gas emissions impact on the environment resulting in reduced indoor and outdoor air pollution, lower energy consumption and costs, and improved community health and wellbeing. To the Society: Establish a leadership role in advancing new industry practices and raising awareness about the importance of reducing building greenhouse gas emissions and increasing community resilience. Revenue resulting from sales of standards, other publications, and educational programs. To the Member: Access to new research results, practices, and tools. Association with ASHRAE mission to serve humanity.
Desired Outcomes	1. Add to body of scientific knowledge to advance technologies and industry practices to minimize building GHG emissions while assuring high levels of building indoor environmental quality, sustainability, and resilience. 2. Establish and maintain at least two new partnerships (through Memorandums of Understanding or by leveraging existing partnerships) with external organizations, societies, or government agencies to collaborate on resilient buildings and communities research and the development/adoption of standards, guidelines, programs, rating systems and educational materials. 3. Develop, publish, and maintain a Whole Life Carbon Building Standard, accompanying Design Guides and design tools, educational programs and materials for adoption and use to address building decarbonization. 4. Establish partnerships with key scientific, technical, government, and non-governmental organizations to advance building decarbonization research, technology, education, and policy. Seek to promote communication among researchers, practitioners, and policymakers through conferences, publications, and marketing efforts.
Key Stakeholders	▪ General Public ▪ Policymakers ▪ Building Owners ▪ Engineers ▪ Architects ▪ Contractors ▪ Governments ▪ Manufacturers ▪ Financial Institutions ▪ Educational Institutions ▪ Society Councils & Committees



BACKGROUND

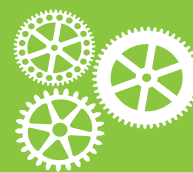
The indoor environment is increasingly recognized as the leading priority for built environment as we navigate the current pandemic, with implications extending beyond simple acceptability of indoor conditions to its influence on individual and environmental health, learning, and productivity. The indoor environment of the future identifies and optimizes interactions among outdoor air quality, indoor air quality, thermal comfort, lighting, and acoustics, based on a firm understanding of implications for occupants' health and wellness. ASHRAE convenes and collaborates with experts and stakeholders across the industry to engage in discussion and exploration of this topic to accelerate collective knowledge in the field. This initiative aims to elevate ASHRAE's role in facilitating this discussion, generating thought leadership and promoting understanding of indoor environmental quality (IEQ) among practitioners.

Strategically, ASHRAE created the Epidemic Task Force to develop and provide guidance surrounding Sars-COV-2 which greatly impacted the indoor air quality environment.

Table 2 provides more detail:

TABLE 2

BUILT ENVIRONMENT OF THE FUTURE: Indoor Environmental Quality			
Resources	Can be funded through technology, publishing and education budgets. Potential exists for funding partnerships with foundations and non-governmental organizations.		
Benefits	<u>To the Society:</u> Establish leadership role in advancing new practice paradigms and improving quality of indoor environmental health for buildings and their occupants. Revenue resulting from sales of standards, other publications, and educational programs. <u>To the Member:</u> Access to new research results and practice tools. Association with ASHRAE mission to serve humanity.		
Desired Outcomes	1. Add to body of scientific knowledge on the relationship of IEQ to health, productivity, and well-being of building occupants and develop practical methods for estimating the economic value of improvements in IEQ such as reduced sick days, reduced health care costs, and improved student learning. 2. Develop knowledge and guidance on understanding the ability to reduce the risk to occupant's health and wellness through different applications and adaptations of HVAC&R systems. 3. Develop an IEQ standard based on health and productivity objectives that addresses air quality, thermal environment, light, sound, and vibration in an integrated way. 4. Establish partnerships with key scientific, technical, and government organizations to advance IEQ research, technology, and policy. Seek to promote communication among researchers, practitioners, and policymakers through conferences, publications, and marketing efforts.		
Key Stakeholders	▪ Policymakers ▪ General Public ▪ European Committee for Standardization (CEN) ▪ Environmental Health Committee and Councils and Committees affected	▪ International Well Building Institute ▪ Regulatory bodies ▪ US General Services Administration (GSA) ▪ US Dept. of Housing and Urban Development (HUD)	▪ International Standards Organization (ISO) ▪ Green Building Councils National Center for Healthy Housing ▪ Foundations interested in wellness/health



BACKGROUND

ASHRAE is a large and complex organization with hundreds of technical, standards, and managerial committees, supported by a rich network of leaders and subject matter experts. ASHRAE will reach its potential for leadership and influence through an organizational structure that eliminates redundancy, has flexibility to adapt to regional differences, and allocates valued time and resources to the most impactful pursuits. This initiative intends to improve internal governance, volunteer, and staffing structures to ensure a strong connection across the societal organization and its chapters around the globe.

Table 3 provides more detail:

TABLE 3

FUTURE OF ASHRAE: Organizational Streamlining	
Resources	Financial contributions, which are expected to be minimal, from the operating budgets of the Councils and Standing Committees. The major resource needed will be time from our volunteer members/leaders at the grassroots and Society level, as well as staff.
Benefits	<u>To the Society:</u> A more flexible, efficient and effective operational framework allowing volunteer time, staff talent and other resources to be reinvested in targeted areas to drive this plan. <u>To the Member:</u> A more accessible association that is using resources to the highest and best use to advance the profession. Ability to move to market more rapidly will result in increased credibility and relevancy of the Society with members and the industry as a whole.
Desired Outcomes	1. Evaluate the staff/volunteer support structure to optimize volunteer engagement, efficiency and effectiveness of the Society (e.g. volunteer time efficiency). Present and implement findings to support the delivery of key products and services (e.g. Guidelines, Standards, Research, Publications, and Programs) with less cost, reduced time to market and an advancement in market responsiveness. 2. Redesign leadership/governance structure to support increased operational efficiency and effectiveness of the organization. 3. Targeted streamlining for operational efficiency and effectiveness through reduction of overlap and optimization of quantity, scopes, and processes (e.g. merging of technical committees for cross communication, efficiency and effectiveness). 4. Increase efficiency of Winter and Annual conferences by reducing volunteer time, staff time, and financial expenditures at Winter and Annual conferences by at least 20%.
Key Stakeholders	▪ ASHRAE Membership ▪ Industry ▪ Leadership of the Board, Councils and Committees affected



BACKGROUND

ASHRAE must evaluate and develop methods to better engage chapters, regions, and the members they serve in an integrated way. A more supportive and proactive strategy for chapter and regional oversight will minimize variability and ensure that all ASHRAE members experience a strong and valuable connection to the local and societal components.

Hybrid¹ learning and meetings are an integral part of this connection.

Table 4 provides more detail:

TABLE 4

FUTURE OF ASHRAE: Improvement of Chapter Engagement, Capacity and Support	
Resources	Can be funded through Members Council budget. Other resources in place include Manual of Chapter Operations, Basecamp and www.ashrae.org/chapterresources .
Benefits	<u>To the Society:</u> Improve operational efficiency to enable chapters, regional leadership and the society to share resources and information more effectively. Accountability for Chapter success is clearer with standardized guidelines and performance metrics. The Society will receive additional revenue resulting from increased Chapter member recruitment and retention. <u>To the Member:</u> Ability to more deeply and more meaningfully engage with ASHRAE's mission.
Desired Outcomes	1. Use a standardized Society-wide system for collecting, recording and benchmarking Chapter-level data and performance metrics. The system will provide an efficient and streamlined process for the exchange of resources and information among Society, Regional leadership and the Chapters. 2. Develop and standardize program guidelines, training, and associated resources based on best practices for all ASHRAE Chapters where possible. When regional differences require flexibility, adapt those guidelines as needed while maintaining the desired outcome (templates, examples, CRC and centralized training). 3. Evaluate methods to "coach" new officers/chairs in each chapter on the duties of their position/role and how best to accomplish them. Also assist them in seeking coordinated collaboration with outside groups when beneficial. 4. Strengthen chapter programs, for example by expanding the Distinguished Lecturer program and reviewing the Short Course business model. 5. Develop methods for promoting the value and benefits of employee participation in ASHRAE to employers to encourage sponsorship and support.
Key Stakeholders	▪ Chapter leadership ▪ Industry associations and organizations within and outside of the US ▪ ASHRAE Members ▪ Universities ▪ A/E Firms

¹Hybrid is defined as a combination of virtual and face to face meetings.

FINANCIAL IMPACT, BUDGETING PROCESS AND RECOMMENDATIONS

The fiscal impacts of the 2019-2024 Strategic Plan are built into the ASHRAE annual budgeting process. This is done in concert with annual planning for the Society theme activities and current cost reduction efforts. The councils and committees provided updates and submitted their budget forecasts in early March 2019 to Finance Committee, Planning Committee and Executive Committee. The updates included support for the 2019-2024 Strategic Plan.

ASHRAE Executive Committee reviewed all budget forecast proposals during their Spring 2019 meeting and developed a list of program and financial priorities. Based on these recommendations, Finance Committee updated the current-year ASHRAE budget and forecasts through 2022. The Treasurer presented this budget to the Board for approval at the 2019 Annual Conference in Kansas City.

Proposals for future work for Society years 2020-2025 resulting from the Society theme initiatives, ad hoc recommendation, or council or committee program must include a minimum three-year budget analysis along with the project's fiscal impact statement and the resulting benefits to the Society. The fiscal impact analysis shall be submitted initially for approval by the Board through Finance Committee and then be updated with actual cost to date for the current fiscal year, cost since inception and updated budget forecasts for the next three fiscal years if the project is expected to extend beyond the current fiscal year. For inclusion in the next fiscal year's budget and future year's forecasts, updates shall be submitted for approval by the Board annually at the winter meeting by the council or committee responsible for the project's oversight and management.

No additional fiscal impact was implemented as a result of the extension of the Strategic Plan.



IMPLEMENTATION

The following measures will be used to assist with the implementation of the Strategic Plan.

1. **Member Satisfaction:** Member Services, under the leadership of the Planning Committee, to establish an annual member survey with consistent satisfaction metrics to allow for year-over-year evaluation of the Strategic Plan.
2. **Member Engagement and Retention:** Institute effort and imagination in developing member retention programs similar to what has been successfully implemented for new member retention activities. Institute special initiatives to increase volunteer engagement:
 - a. Planning Committee should coordinate and conduct a focused workshop/focus group exercise with Membership Promotion Committee, Chapter Technology Transfer Committee, ASHRAE Learning Institute, and Handbook Committee to develop a common collaboration and integration strategy for member retention.
 - b. Strengthen volunteer engagement at the Chapter level by expanding recommended chapter committee and subcommittee structures within Chapter Operations Manual and promote consistent annual population of the structure through the PAOE program.
 - c. Expanding chapter committee and subcommittee structures for non-North American Chapters recognizing the unique needs and opportunities for these chapters to engage chapter members.
 - d. Institute a yearly membership drive to promote and increase active membership and participation in Technical and Standards Committees.
3. **Operational Efficiency:** ExCom to study and focus on trends in the Operating Cost per Member and develop strategies and action items to bring to the Board to optimize operational efficiency.
4. **Market Responsiveness:** Pub Ed Council and Tech Council to redesign their respective product to market processes to reduce the average time to market for our products. The current average time to market of 6.8 years must be shortened if we are to stay relevant as market leaders. This metric might only be improved by concentrating on processes such as “one product at a time.”
5. **Research Leadership:** Focus on leveraging ASHRAE Research dollars with matching funds from other research partners and funding sources. This may require dedicated staff to track and manage if we are to be effective. Senior thought leadership should be engaged along with the Manager of Research, Tech Council, RAC and TAC to develop strategies and metrics to maximize the return on investment and conversion of research into practical application guidelines and standards in research topics of interest and concern to the ASHRAE membership.