

REHVA TRC Guidelines

How to gather and coordinate experts to publish REHVA guidebooks and other technical documents

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1 REHVA TRC

Introduction

The Technical Research Committee (TRC) is one of REHVA's standing committee as defined in the articles of the association. It is chaired by one chairperson and one or several co-chairs, and composed by core members, with voting rights, and corresponding members, without. The chairperson(s) and core members of the TRC must be delegated by a member association and approved by the board. Member associations can also delegate corresponding members. Supporter Companies and Associated Organisations may also delegate members, who will always be considered corresponding members.

TRC core members who haven't attended a meeting for a year will be automatically moved to the list of the corresponding members.

The work of the TRC is carried out by Task Forces (TF).

Delegate membership

Member Associations wishing to delegate representatives to TRC shall send to the TRC secretary the following of the prospective members:

- Name and last name;
- Email;
- CV;
- Status sought, either core or corresponding member.

This information shall be sent preferably 3 weeks before the next TRC in-person meeting. Upon approval by the TRC chairperson(s) and the REHVA Board of Directors, the prospective member(s) will be voted by TRC by simple majority.

2 REHVA TRC Task Forces

What? - Composition

A REHVA TRC TF is composed by an international team of HVAC and building experts - TF members - that works under the supervision of the REHVA TRC on a proposed topic or task of joint interest.

TF members are volunteers who commit to work on a certain topic approved by the TRC. REHVA's climatic and cultural zones diversity shall be represented in the TF with participants from at least three different MAs. External experts (i.e., not affiliated to a REHVA Members Association) on a certain topic, including representatives of [REHVA Supporter Companies](#) and [Associate Organisations](#), can also be TF members. However, REHVA shall always be sufficiently represented in the TF by leading experts as co-chair or an active member.

Why? - Aim

The TF aims to publish technical knowledge to support and update HVAC designers, building services engineers, technicians, and practitioners on a well-defined topic relevant for their professional practice.

The technical knowledge shall be aligned with REHVA's mission:

REHVA's mission is to develop and disseminate economical, energy efficient, safe,

and healthy technology for mechanical services of building; to serve its members and the field of building engineering (heating, ventilation, and air conditioning) by facilitating knowledge exchange, supporting the development of related EU policies and their national level implementation.

Furthermore, a key ambition of REHVA is to develop knowledge products that are published and marketed by REHVA. Consequently, REHVA TF shall be balanced between technical relevance of the outcomes produced, and its marketing potential.

How? - Technical-Marketing balance

The REHVA TF outcomes' must be approved by both the Technology and Research Committee (TRC) and Publishing and Marketing Committee (PMC). The former shall validate the outcome's technical relevance and soundness. The later shall evaluate the relevance, market demand & market potential of the planned outcome.

Depending on the composition of the REHVA TF and the type of outcome foreseen, the participation of additional REHVA committees may be needed (e.g., Supporters' Committee (SC), Education and Training Committee (ETC), etc.).

Note that the different committees, markedly through the respective secretariats, are at any prospective TF disposal to strengthen the technical-marketing-sponsored value of the TF.

3 REHVA TRC TF outcomes

The work of a REHVA TF can result in different types of outcomes:

- The main outcome is a consensus document on engineering practice in the format of a REHVA Guidebook (GB).

The technical knowledge contained in a REHVA GB can be adapted to other formats and outcomes, such as:

- Digital knowledge sources and tools: digital calculation & information tools, online tutorials, recorded presentations & expert talks, infographics, fact sheets, etc.
- Course materials & online courses

In addition, other types of outcomes can also be produced by a REHVA TF:

- Pre-normative work and support to standardisation activities, guidelines, case studies, country-by-country analysis, etc. For example, in the format of a technical report or white papers.

Table 1 summarises the typical¹ features of the publication options.

¹ The actual features of each publication are very much content-dependent and must be agreed with TRC and PMC.

Table 1. Possible features of Task Force publications

	REHVA Guidebook	Course materials	Digital tools & video sources	Technical reports & white papers
Goal	Provide EU level harmonised and practical guidance and state-of the art knowledge based on the broad consensus of professionals and standards			For example, focus on future technology and HVAC-system development, or pre-normative work that supports standards and future guidebooks
Contents	European engineering practices, how to apply knowledge into practice. <u>Well detailed case studies are requested.</u>	Practical, short online courses and training materials (3-6h) including curriculum, course materials, assessment materials, assignments, etc.	Digital tools, checklists, process flowcharts, calculation tables, etc. With written or recorded video explanation how to use them	Collection of basic design and calculation principles or country specific information
Publication format	Printed and/or Digital	Course in REHVA Learning Management System (under development)	Resource in REHVA Knowledge Hub (not yet developed)	Digital
Production costs	1,500€ ^a	.. ^b	.. ^c	500€ ^d

^a English proofreading, typesetting, PDF-protected. 30 hard copies.

^b To be determined.

^c English proofreading, at a rate of 25€/1000 words.

^d English proofreading, typesetting, and PDF-protected. No printing.

While REHVA GB may be a standalone outcome, REHVA aims at combining these with the other digital tools listed above for improved and better tailored knowledge dissemination, as well as supporting the marketing and promotion of the guidebooks. REHVA also encourages the development of training materials and online courses based on the guidebook content in a systemic way to diversify the offered products. Thus, it is convenient that the technical knowledge is developed from the start in a modular manner (Figure 1).

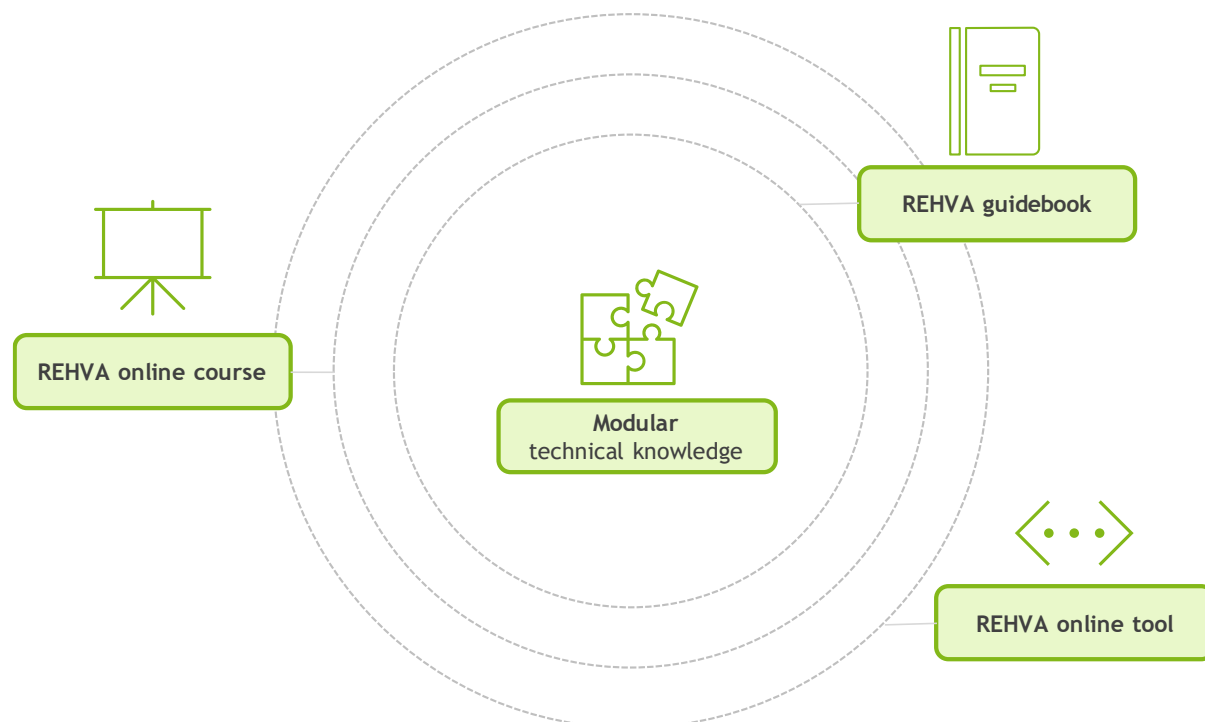


Figure 1. Modularity and exploitation of technical outcome

4 Life cycle of a REHVA Task Force. Bottom-up

1. Presentation & approval of a TF idea by the TRC meeting

1.1. A TRC member proposes an idea of topic at a TRC meeting abiding by the official guidelines (see Annex I). *It is also possible for the idea to stem from a REHVA Supporter. In that case a similar process, but top-down, would occur.*

1.2. The TRC approves or rejects a topic.

If the TRC approves a TF topic, it invites the TRC member who proposed the topic to elaborate a Work Plan abiding by the official template (see Annex II). It is customary for the TRC member(s) who proposes the topic to be the TF chair, but it is also possible for any TRC member to present a topic, welcoming other TRC members to lead the work as TF chair. If the TRC rejects a TF topic, the process for the prospect TF finishes or shall begin again with an update presentation of an idea.

2. Development of Market Analysis by PMC

2.1. TRC secretary notified PMC secretary of the approved idea, and the PMC assesses the market potential of the proposed idea.

3. Submission & approval of a TF Work Plan

3.1. Upon acceptance of the market potential of the proposed idea, the TF represented at least by its chair(s) must submit a Work Plan abiding by the official template (see Annex II) to the TRC within three months.

3.2. TRC secretary evaluate if the submitted Work Plan complies with the formal requirements and may ask modifications from the TF before putting it for approval on the respective committee's agenda. Depending on the composition of the REHVA TF and the type of outcome indicated in the Work Plan, the participation of additional REHVA committees' secretaries may be needed (e.g., Supporters' Committee (SC), Education and Training Committee (ETC), etc.).

If TRC secretary approves the Work Plan, it can be inserted on the respective committee's agenda. If TRC secretary doesn't approve the Work Plan, chair(s) shall rework on the proposal and re-submit it to the committee's secretary.

3.3. Once the Work Plan is formally accepted by TRC secretary, the TRC secretary puts it on the next meeting agenda of the TRC. The Work Plan shall be inserted in the agenda of the next TRC meeting at least 2 weeks in advance, to enable time of TRC members to assess it before the meeting.

3.4. Presentation of the Work Plan by the chair(s), discussion & approval by TRC members with focus on the scope and technical content.

In case the TRC asks for modifications, there shall be an eventual re-submission of the Work Plan to the TRC.

4. Sponsorship of approved TF outcomes

4.1. TRC secretary, together with the secretaries of additional REHVA committees (e.g., Supporters' Committee (SC), Education and Training Committee (ETC), etc.) will work on a proposal to SC secretary to find a sponsor of the TF activities within REHVA network.

5. TF work development

This is further elaborated in section 0.

6. Publication of TF outcome

This is further elaborated in section 5.

The process outlined is graphically represented in Figure 2.

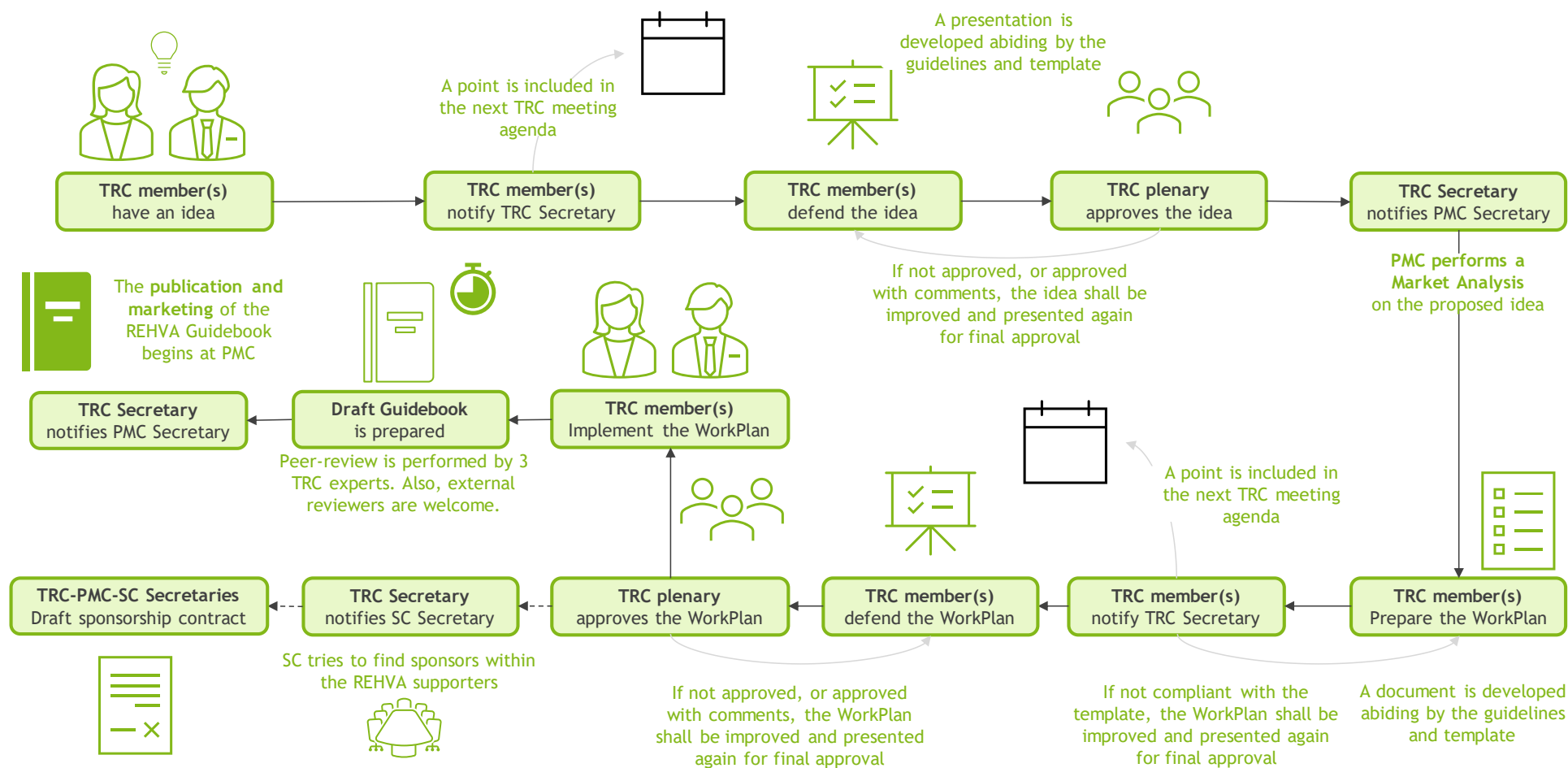


Figure 2. Cross-committee process for the TRC TF development. Bottom up

4.1 Technical outcome preparation

A REHVA TF is autonomous and can be organised as the members decide, under the coordination of the REHVA TF chair(s). It is customary that REHVA TF members have a kick-off meeting after the Work Plan is approved, and subsequent coordination meetings until the final draft of the outcome(s) is prepared. The meetings are to be held online, to reduce cost.

Each REHVA TF should periodically report at TRC meetings about the work progress and eventual changes in the Work Plan. Any TF member, preferably the TF chair(s), can provide such report, which needn't be a written report, although a presentation of the progress is welcome.

In case the initial Work Plan changes significantly, the TF must re-submit the revised Work Plan to the TRC & PMC for a new approval. An example of a significant change is the modification of the outcome(s) foreseen.

The technical outcome preparation phase ends with a final draft agreed by the REHVA TF members.

4.2 Peer-review

The peer-review phase begins once the technical outcome preparation phase ends and it is dependent on the type of outcome.

- In case the outcome of the TF work is a guidebook or a technical report, at least four peer reviewers shall review the final draft. Reviewers should be proposed and approved by TRC. If the initially identified reviewers are not available, TF chairs should inform the TRC and propose new candidates for approval before proceeding with the review. The TRC may also nominate new experts for the review. It is the TF chair's role to communicate with the peer reviewers and coordinate with the TF member that the comments are addressed. The TRC secretary should be kept in the loop of the final review process and may assist the TF chair as needed.
- For other type of the relevant decision-making process must be followed (beyond the scope of this guidance). It shall be coordinated by the TRC secretary.

A summary of the review process (i.e., indication of the received comments, and the respective reaction by TF members) should be sent to TRC secretary for dissemination among the TRC members, either via email or during a TRC meeting.

Once the review is completed, TF chairs and the TRC shall ensure that review comments and concerns are considered in the final document. The final draft of the outcome must be approved by the TRC before it is sent to publication.

5 Publication of guidebooks and technical reports

The publication process is overseen by the PMC and the PMC secretary (mj@rehva.eu).

REHVA has non-exclusive rights to the results of Task Forces and exclusive publication rights to the products of the Task Forces.

It is the TF chairs responsibility to establish and confirm the copyright status of all graphs and figures used in the guidebook, to apply the copyright references and if necessary, ask the approval of the author to use her/his intellectual property (IP). REHVA by default aims to use graphs and figures of the authors with their knowledge and approval that are free of charge. In case this is not possible, the TF chairs should inform the REHVA office via the PMC secretary to identify a solution.

5.1 English review, typesetting, publication

1. After the guidebook or technical report has been reviewed, the PMC secretary handles the process of the English review in cooperation with the TF chair(s). The TF chair has two weeks after the review is done to correct eventual comments and approve the final EN manuscript before it is sent for typesetting.
2. Once the EN review manuscript is approved by the TF chair(s), the PMC secretary starts the typesetting, which usually takes 4-6 weeks. The TF chair should be available for eventual questions and comments by the typesetter. The TF chair has 2 weeks to review and approve the typeset, print ready manuscript (pdf).
3. After the typeset print ready manuscript is approved, the PMC secretary arranges the printing of the paper books (in case there is a printed version) and prepares the pdf book for launch in the REHVA eShop. REHVA aims at launching new guidebooks and reports at the major REHVA events (Annual Meeting, Brussels summit, CLIMA), where TF chair(s) are invited to present the guidebook.

Annex I. TEMPLATE. IDEA

The idea description should be submitted to the secretariat of the TRC committee (pcm@rehva.eu).

The idea description should abide by the official template annexed.

Annex II. TEMPLATE. WORK PLAN

The Work Plan description should be submitted to the secretariat of the TRC committee (pcm@rehva.eu).

The Work Plan description should abide by the official template annexed.