



# MINUTES

## Handbook Committee Meeting

**January 26, 2003  
Palmer House Hilton  
Chicago, IL**

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### MEMBERS

Ken Cooper, Chair and 2003 *Applications* Chair  
Charles Francis, 2003 *Applications*  
Henry Manczyk, 2003 *Applications*  
Derald Welles, 2003 *Applications*  
Brian Rock, 2003 *Applications*  
Lynn Werman, 2004 *Systems* Chair  
Prakash Damshala, 2004 *Systems*  
Monica Amalfitano, 2004 *Systems*  
Ron Davis, 2004 *Systems*  
Garry Myers, 2004 *Systems*  
David Underwood, 2005 *Fundamentals* Chair  
Lane Jackins, 2005 *Fundamentals*  
John Wells, 2005 *Fundamentals*  
Bill Fleming, 2005 *Fundamentals*  
George Carscallen, 2005 *Fundamentals*  
Norm Maxwell, 2006 *Refrigeration* Chair  
Brian Krafthefer, 2006 *Refrigeration*

Rich Evans, 2006 *Refrigeration*  
Benjamin Sun, 2006 *Refrigeration*  
Tino Mendez, 2006 *Refrigeration*  
Bill McCartney, 2006 *Refrigeration*  
Julian de Bullet, Coordinating Officer  
Max Sherman, BOD Ex-Officio  
Mark Owen, ASHRAE staff liaison

### VISITORS

Hugh Crowther, Board Planning Committee  
Steve Comstock, ASHRAE staff  
Mark Hertel, TC 6.7 Handbook Chair  
Art Hallstrom, Standards Committee  
Charlie Curcija, TC 4.5 Handbook Chair

**INDEX OF MAJOR PASSED MOTIONS**

- | <b>No.</b> | <b>Motion</b>  |
|------------|--|
| 2          | To accept the objectives of the Handbook Committee Content Action Plan ( <i>Attachment B</i> ) with Mr. Rock's suggested change and recommend them to Publishing Council for adoption with the understanding that the actions under each objective are preliminary and not yet accepted    |
| 3          | To express to Publishing Council the view of this committee that paid Handbook content advisors are unnecessary to the ongoing Handbook content improvement effort for the following reasons...(see pp. 4-5 of minutes)  |
| 4          | To assign AHR 193, Engine-Driven Heating and Cooling Equipment, to TC 9.5, Cogeneration Systems  |
| 5          | To place the new chapter from TC 4.12, Integrated Building Design, in the Applications volume  |
| 6          | To recommend to Publishing Council the addition of the language in Attachment F to the Handbook Committee Manual of Procedures (MOP)   |
| 7          | To adopt the Draft Strategic Emphasis for Handbook Committee ( <i>Attachment H</i> )   |
| 8          | To recommend to the Board Ex-Officio member (Mr. Sherman) that Mr. Cooper be returned as Handbook Committee chair for the 2003-2004 year, to return to the previous succession pattern, in which the current volume subcommittee chair becomes the full committee chair the following year |

**INDEX OF ACTION ITEMS**

<b>No.</b>	<b>Responsibility</b>	<b>Action Item</b>
1	Welles, Ratcliff	Obtain Handbook chapter checklists from TCs 9.8 and 2.2, respectively.
2	Cooper, Underwood	Discuss 2005 Fundamentals volume subcommittee replacement.
3	Rock	Present revised Handbook Author and Reviser Guide for approval in June.
4	Werman	Develop Handbook Committee member training course.

**Call to Order**

Mr. Cooper called the meeting to order at 9:07 a.m.

**Introduction of Members and Visitors**

Mr. Cooper welcomed all attendees. Members and visitors introduced themselves.

**Approval of Minutes**

It was moved and seconded:

**(1) To approve the minutes of the Committee's June 23, 2002 meeting in Honolulu.**

**MOTION (1) PASSED, approved by voice vote**

The minutes of the October 2002 Strategic Planning/Executive Committee meeting were also presented for information.

**Chairman's Comments**

Mr. Cooper reported that Publishing Council had passed along to the Board the committee's recommendation that the four-volume HandbookCD be established as the primary member benefit instead of the print volume or the one-year HandbookCD, beginning with the 2004 volume year. The Board also approved the recommendation in Honolulu. Since that time, there has been much discussion of the change among various groups, and Mr. Cooper indicated that it will be a major item on this meeting's agenda.

### **BOD ExO Report**

Mr. Sherman confirmed that there has been much high-level activity regarding the Handbook on issues such as its target audience and its role as a member benefit.

### **Coordinating Officer Report**

Mr. de Bullet emphasized the extreme importance of the Handbook as the primary member benefit; work on its improvement must be continuous. He also noted the Society emphasis on expanding its ranks in the industry among those with a broader, perhaps less technical range of information needs. He stated that making the Handbook more user-friendly should help, as should development of the eBook.

### **Board Planning Committee (BPC) Liaison Report**

Mr. Crowther explained his presence to facilitate and advise the committee regarding the Board's new goal-generating process, designed to avoid "top-down" management of details. Goals are identified by the BPC in conjunction with the committees, approved by the Board, and given back to the committees to implement. He stated that the Board will not tell the committee what should go into the Handbook; the Handbook Committee makes that decision, working with TAC and the TCs to achieve agreed-upon goals.

### **Handbook Committee Content Action Plan**

The committee first reviewed a draft of the "ASHRAE Handbook Technical Content Revision Plan" from Technology Council's Oversight Subcommittee (*Attachment A*). Mr. Crowther acted as a facilitator of the discussion, and noted that the key issues in the draft seem to be the introduction of "Technical Content Coordinators", whether they should be paid, and to whom they should report. Mr. Maxwell and others voiced doubts that any individual can technically evaluate an entire volume, and that paying such coordinators would undermine the volunteerism presently powering Handbook content development.

The committee next considered the "Handbook Committee Content Action Plan" draft dated January 25, 2003 (*Attachment B*). With apparent consensus on the four main objectives, discussion focused largely on actions needed to complete the objectives.

Mr. Fleming asked what would happen if a TC asks for aid in correcting a chapter; Mr. Underwood suggested that a special project could be proposed to focus on a part of a volume, reducing the cost. Mr. Crowther noted that the TAC plan had been designed in part to help

provide an ongoing “memory” for the TCs in tracking the evolution of chapter information, as opposed to the short-term projects being discussed.

Mr. Maxwell questioned whether the introduction of nonvolunteers would change the Society’s liability regarding Handbook information; it was agreed that legal issues should be reviewed by staff in the event such measures moved forward.

Mr. Rock suggested rewording Objective No. 3 to “Correct the chapters identified as having drifted.”

Regarding proposed action “i” under Objective No. 3, Mr. Owen repeated concerns voiced by Mr. Comstock and others about any plan or action that separates final content responsibility from the responsibility for publishing and from schedules. Mr. Crowther noted also that TAC believes strongly that it alone (the TCs) should have authority over Handbook content, superseding even that of the Handbook Committee. Mr. Krafthefer mentioned the possibility that content coordinators with the power to overrule TCs might have the unintended consequence of causing TCs to back away from their legitimate content responsibilities. Mr. Werman agreed that the Handbook comes “from the ground up” but also stated that, even after 30 years in the industry, he does not feel comfortable commenting on the technical content of an entire volume. Mr. Carscallen urged that the committee’s plan not impose on the TCs any outside “experts.” Mr. Sherman stated that many of the perceived problems result from the lack of formal review of chapters after they are drafted. Mr. Underwood noted that liaisons are responsible for a nontechnical review as to whether chapters meet established criteria. Mr. Damshala stated that committee members are expert enough to do such reviews. Mr. Fleming emphasized that paid coordinators are not needed; the TCs need to be given a chance without imposing such individuals on them. Mr. Sun agreed, saying that such coordinators would likely be resented; however, the TCs could be offered help when they have trouble getting volunteer revisers. He continued that the process needs to be improved but not necessarily totally reconstructed.

It was moved by Mr. Welles and seconded by Mr. Evans

**(2) To accept the objectives of the Handbook Committee Content Action Plan (*Attachment B*) with Mr. Rock’s suggested change and recommend them to Publishing Council for adoption with the understanding that the actions under each objective are preliminary and not yet accepted.**

**MOTION (2) PASSED, 20-0-0, Chair Not Voting (CNV)**

It was moved by Mr. Maxwell and seconded by Mr. Evans

**(3) To express to Publishing Council the view of this committee that paid Handbook content advisors are unnecessary to the ongoing Handbook content improvement effort for the following reasons:**

- **A few “problem” chapters can be identified and corrected without adding a new layer of oversight**
- **Stipends would undermine the volunteer nature of technical content development**

- **It is questionable whether any individual possesses the knowledge to provide technical content review of all chapters in any Handbook volume**
- **Adding a review step would subtract from the time available to revise chapters in a process that is already on a tight schedule**
- **A concentrated effort using existing committee structures and procedures can effectively address the problem**

**MOTION (3) PASSED, 20-0-0, CNV**

### **Volume Subcommittee Reports**

#### **2003 Applications**

Mr. Owen reported that editing is under way and presently on schedule to publish the 2003 volume by June 1 and that all but five chapters have been submitted; missing are two from TC 2.2 and three from TC 9.8. Mr. Cooper stated that Mike Ratcliff, liaison to TC 2.2, reports consensus to republish two of their chapters from 1999. Mr. Welles, liaison to TC 9.8, reported that the TC's Handbook chair resigned and the revised chapters for 2003 cannot be located; the TC's consensus is that there are no substantial changes needed for 2003. Mr. Welles recommends that the chapters be published as in 1999. Mr. Owen stated the need for both TCs to provide their checklists with a vote to republish the 1999 versions. **(ACTION ITEM #1)**

#### **2004 Systems and Equipment**

Mr. Werman presented his findings regarding AHR 193 (2000 Systems Chapter 47, Engine-Driven Heating and Cooling Equipment). The responsible TC (TC 7.4, Combustion Engine Driven Heating and Cooling Equipment) was dissolved in 2002.

It was moved by Mr. Werman and seconded by Mr. Damshala

**(4) To assign AHR 193, Engine-Driven Heating and Cooling Equipment, to TC 9.5, Cogeneration Systems.**

**MOTION (4) PASSED, approved by voice vote**

#### **2005 Fundamentals**

Mr. Underwood reported that a volume subcommittee member (Mr. Joppolo) has not responded to contact efforts, despite indicating, in earlier communication, his intention to participate. Mr. Sherman recommended that the member be asked to resign and that the Handbook chair can request a replacement in June. Mr. Cooper stated that he and Mr. Underwood will discuss the matter **(ACTION ITEM #2)**. Mr. Sherman noted that the Board meets March 7; a message received before then can be passed along to the Board.

Mr. Underwood also reported that the proposal for a new chapter on enhanced heat and mass transfer had been withdrawn by TC 1.3.

## **2006 Refrigeration**

Mr. Maxwell reported that the committee's reviews of 2002 chapters have been received and are being distributed for consideration in the 2006 revision process.

## **Information Items**

### **Year 2002/2003 MBO Status**

Mr. Cooper presented his 2002/2003 MBOs (*Attachment C*).

### **AHR Lists**

Mr. Owen presented a revised AHR list and a chapter schedule (*Attachments D and E*).

## **Action Items**

### **Location of New Chapter from TC 4.12, Integrated Building Design**

It was moved by Mr. Underwood and seconded by Mr. Rock

**(5) To place the new chapter from TC 4.12, Integrated Building Design, in the Applications volume.**

**MOTION (5) PASSED, approved by voice vote, 1 abstention**

### **Dispute Resolution Procedure (Publishing Council Action Item)**

It was moved by Mr. Maxwell and seconded by Mr. Rock

**(6) To recommend to Publishing Council the addition of the language in Attachment F to the Handbook Committee Manual of Procedures (MOP).**

Mr. Maxwell presented the language produced by the Dispute Resolution Subcommittee (Maxwell, McCartney, Davis). Suggested modifications to the proposed change included the following:

3.6.3.2 Handbook Liaison brings the concern to the Handbook Volume Chair, ~~who and~~ notifies the ~~entire~~ Handbook Committee Chair.

3.6.3.4 If at this stage the conflict is unresolved, a~~A~~ Handbook Committee Resolution Team consisting of Handbook Chair, Volume Chairs, and DAL is formed.

3.6.3.8 The results of the dispute are reported to ~~the~~ Publishing~~ing~~ Council.

It was also suggested to add the following cross reference to the end of paragraph 2.11: "(see the procedure described in section 3.6)."

Mr. Maxwell agreed to modify his motion to reflect the modifications.

**MOTION (6) PASSED, 20-0-0, CNV**

### **Commercialism Policy Subcommittee Report**

Mr. Fleming and Mr. Rock presented their suggested revision to the Handbook Author and Reviser Guide (Attachment G).

### **Author and Reviser Guide Revision Subcommittee Report**

Mr. Rock reported that a first draft of a revised guide is out to his subcommittee (Amalfitano, Jackins, Krafthefer, Manczyk). Their recommendations will be presented in June (**ACTION ITEM #3**).

### **Handbook Committee Member Training**

Mr. Werman reported that he is assembling a subcommittee to gather material for organizing into a course. Sources will include the Author and Reviser Guide, Manual of Procedures, and the Board-Approved Rules. He is also considering enlisting the aid of Dennis Wessel, past Handbook chair, to share his training expertise. (**ACTION ITEM #4**)

### **TC Chair Meeting Assignment**

Mr. Jackins volunteered to represent the committee at the TC Chairs Meeting at 7:00 a.m. Monday.

### **Strategic Planning Subcommittee Report**

Mr. Cooper presented a “Draft Strategic Emphasis for Handbook Committee” (*Attachment H*), formulated at the October 2002 of the Strategic Planning/Executive Subcommittee.

It was moved by Mr. Underwood and seconded by Mr. Fleming

**(7) To adopt the Draft Strategic Emphasis for Handbook Committee (*Attachment H*).**

**MOTION (7) PASSED, 20-0-0, CNV**

### **Old Business**

#### **2002 Refrigeration Chapter Review**

(See Mr. Maxwell’s report for the 2006 Refrigeration volume)

#### **2004 Launch of Four-Volume HandbookCD Member Benefit**

Mr. Comstock noted the Board’s approval of the member benefit change starting in 2004, and also the recommendation from Publishing Council that comments be solicited from other groups within the Society; such comments are being heard now. However, Mr. Comstock continued, this meeting will be the last opportunity to revisit the issue before the dues notice for the 2004 year must be finalized and sent. Mr. Comstock also repeated his concern about completing the four-volume HandbookCD for publication in June of 2004, because it has not previously been completed before September or October of any year. Several members questioned whether the committee should recommend to Publishing Council that the transition be postponed by a year.

After further discussion, the consensus was to make no further recommendation to Publishing Council on the matter.

### **New Business**

#### **October Meeting Request**

Mr. Cooper directed that the report to Publishing Council include a request for an October 2003 meeting, noting that the Handbook Committee is authorized to hold three meetings each year.

#### **2003-2004 Committee Chair Recommendation**

It was moved by Mr. Maxwell and seconded by Mr. Welles

**(8) To recommend to the Board Ex-Officio member (Mr. Sherman) that Mr. Cooper be returned as Handbook Committee chair for the 2003-2004 year, to return to the previous succession pattern, in which the current volume subcommittee chair becomes the full committee chair the following year.**

**MOTION (8) PASSED, approved by voice vote, CNV**

Mr. Sherman stated that he will consider the desire of the committee in his recommendation to the Board.

#### **Online Review/Revision Plan Coordination**

Mr. Hallstrom requested that Handbook and Standards coordinate efforts to establish online review/revision capabilities, to avoid duplication of efforts and to enhance compatibility.

### **Adjournment**

The meeting was adjourned at 12:10 p.m.

Respectfully submitted,

Mark S. Owen  
Handbook Editor

## ASHRAE HANDBOOK TECHNICAL CONTENT REVISION PLAN

For Submission by Oversight Subcommittee to Technology Council  
January 28, 2003

(Based on meetings with TAC, TAC's Handbook Rewrite Ad Hoc Committee [including the chairs of the Handbook Committee and Special Publications Committee] and Staff)

**OBJECTIVE:** To improve the perceived value of Handbook content to the membership and other Handbook users. This will require identification of target audience(s), and their needs, for each volume.

The following tasks will accomplish the implementation of this objective.

1. Recommendations for revisions to the *Handbook Author and Reviser's Guide* (Handbook Committee, assisted by Owen, Coad, and TAC). Schedule: Oct. 02-Winter Meeting 03.
  - Review forms for each chapter for use by the TCs
  - Require demonstrated action by TCs for each chapter
    - i. Review of chapters prior to chapter revisions
    - ii. Reading of final chapters before voting
  - Require references to old, but still useful, material available in previous versions of the handbook.
2. Provide additional training for Chapter Authors (Handbook Committee and TAC). Schedule: Starting with Winter Meeting 03.
  - Replace the TAC rollover workshop with expanded authors' workshop
    - i. Include presentation of revised *Handbook Author and Reviser's Guide*
    - ii. Identify authors with well written chapters to provide guidance on how to review/write chapters
    - iii. Show some of the better chapters as illustrative examples
3. 2004 Systems and Equipment Volume (Coad, Hegberg, Think Tank, TAC). Schedule: Oct. 02 – July 03
  - Identify chapters that need the most revision (Coad, Think Tank, TAC)
  - Contact subcommittee chairs for these chapters before Chicago to let them know problems (Handbook Committee)
  - Meet with TC subcommittee chairs at Winter Meeting to determine improvements that can be made. (Handbook Committee and TAC Handbook Subcommittee.)
  - Coordinate schedules for handbook chapter with those requiring substantive revisions (Handbook Committee)
4. Develop a "Design Roadmap" concept for the handbooks (TAC: Hegberg, Int-Hout, Bahnfleth). Schedule: June 02 - ongoing
  - Air and hydronic systems, and selection of chillers, boilers, and cooling towers for the 2004 Systems and Equipment volume
  - Loads for the 2005 Fundamentals volume
  - Others (such as duct systems) to follow in later volumes
5. Propose Changes to Organizational Structure for Handbook to Accommodate Appointment of Handbook Subcommittee Chairs to Serve as Technical Content Coordinators for Each Volume (See "Proposed Organizational Assignments for Handbook Content" below) (BOD, assisted by Publishing Council and Technology Council). Schedule: Oct. 02 – ongoing

- Handbook Committee and TAC to develop job description and coordination responsibilities for Technical Content Coordinators
  - Determine whether remuneration for service as Technical Content Coordinator will be provided, and if so, the nature (honorarium or contract) and amount of that remuneration.
  - President-Elect to appoint Technical Content Coordinator for 2005 Fundamentals volume by Feb. 03
  - Board to elect Technical Content Coordinators for subsequent volumes:
    - a) 2006 Refrigeration volume by Jan. 04
    - b) 2007 Applications volume by Jan. 05
    - c) 2008 Systems and Equipment volume by Jan. 06
6. Develop a Web-enabled review process for chapters (Hegberg, staff). Schedule: Jan. 03 - ongoing
- Enables grass roots membership to provide review comments on specific chapters or handbooks
  - Provides better logging of comments
  - Provides direct feedback to handbook subcommittees in TCs working on chapters

Proposed Organizational Assignments for Handbook Content

1. Confirm scope and purpose of Handbook Committee as it is currently appears in the BAR, specifically that it "...shall formulate editorial policies, solicit reviewers and authors, and judge the suitability of material for publication."
2. Maintain the practice of having the President-Elect appoint the Handbook Committee chair for the following year and having this individual be the subcommittee chair of the Handbook volume published that year (the year preceding the term as committee chair).
3. Institute a process whereby the Board elects the subcommittee chair for each volume (one volume appointed per year with those elected serving a four year term, chairing the subcommittee from the start of the publication process through to its conclusion). These subcommittee chairs should be selected on the basis of their knowledge of the application needs of the ASHRAE membership for the practice of HVAC&R engineering and should have writing and/or editorial experience in the HVAC&R field. Note that even though writing and/or editorial experience is required this is not needed to actually perform editorial work. Rather this is a requirement to ensure that subcommittee chairs are effective communicators and can advise chapter revisors when they are not effectively communicating technical content and to assist them in developing the appropriate content. ). These subcommittee chairs shall serve as "Technical Content Coordinators" for their respective volumes
4. Each newly elected subcommittee chair shall recommend to the President-Elect four (4) individuals who will serve four (4) year terms as subcommittee members assisting the chair in assembling and directing editorial content of the volume.
5. The Handbook Committee, soliciting input from TAC, shall maintain the *Handbook Authors' and Revisors' Guide*, schedule for volume completion, resolution of conflict, and most importantly, review of editorial content to ensure compliance with the revisors' guide and satisfaction of editorial objectives, e.g., meeting the information needs of the Handbook's primary users.
6. TAC will continually monitor TC compliance with *Handbook Authors' and Revisors' Guide* requirements and adherence to instructions and guidance from the volume subcommittees of

Handbook Committee.

7. The Editor of the Handbook continues as a staff position reporting to the Handbook Committee and working with the each respective Handbook subcommittee. The editor will be responsible for executing the editorial and publishing duties assigned to him/her by the subcommittee chairs and their memberships.
8. To provide an interface with TAC and to enlist TAC support in motivating TC compliance with Handbook content objectives, the chair of Handbook Committee will be an ex-officio member of TAC and the Oversight Subcommittee of Technology Council.

## **Handbook Committee Content Action Plan**

January 26, 2003

The Handbook Committee offers the following plan in response to the charge enumerated in the Report to the Board of Directors from the Board Planning Committee, March 2002.

The committee discussed the strategic planning initiative approved by the Board at the January 2002 meeting: *ASHRAE shall revise the Handbook series to make the Handbooks more relevant to ASHRAE's primary customers.*

### **OBJECTIVES:**

#### **1. Review current Handbook content criteria for relevance to member needs.**

##### **ACTION:**

- The Handbook committee and others have reviewed the current criteria as enumerated in the Reviser Guide and have found them to be relevant to the needs of the membership at this time. This objective is complete. Attached is an excerpt of these criteria for each volume.

#### **2. Identify chapters that have drifted from these criteria.**

##### **ACTIONS:**

- Conduct preliminary review (information indicates that most chapters do meet the criteria.
- Organize, review, and prioritize comments from
  - i. Past President Jim Wolf's visits to chapters
  - ii. Web-based surveys already done by staff

#### **3. Correct the chapters.**

##### **ACTION:**

- Enlist the aid of an "expert technical content coordinator" to provide guidance to the Handbook Committee and to TCs where required.
  - i. Guidance will aim at incorporating a proper content balance (see attached excerpt from Reviser Guide and Committee MOP).
  - ii. Changes must meet established publishing deadlines.
  - iii. The coordinator will provide the Handbook Committee with suggestions and changes for improving the usability of chapters.

#### **4. Develop a process to ensure that Handbook chapters continue to meet the established criteria.**

##### **ACTIONS:**

- Expand existing annual training for all Handbook chapter revisers.
- Establish formal Handbook Committee member training.
- Improve web-enabled comment collection and publicize its availability.
- Review Handbook Reviser Guide criteria for relevance on an annual basis
- The Current MOP provides Handbook final authority for content. Develop better collaboration process with TAC for making needed changes.

**Excerpt from the *ASHRAE Handbook Author and Reviser Guide*:**

...Typical users include consulting engineers, design engineers, plant engineers, contractors, and engineering students...

**CONTENT**

The Handbook series includes four volumes. One volume is published each year in two editions, one using Inch-Pound (I-P) units of measurement and the other using the International System of Units (SI). The sequence is as follows:

***Fundamentals***

Fundamentals chapters provide concise descriptions for the basic engineering principles used in the HVACR industry. Lengthy derivations are not found here.

Fundamentals chapters may also provide basic data used in HVACR calculations and processes. Tables and graphs are available for the design engineer.

These chapters address current design information useful to the practicing engineer. They address principles of operation and the effect of design parameter changes.

***Refrigeration***

Refrigeration chapters cover the various types of equipment and systems used in refrigeration applications in the food industry, the process industry and in industrial facilities.

Refrigeration chapters may also include basic data, such as properties of foodstuffs, and calculations peculiar to the refrigeration industry. Such information would not normally be found in one of the other volumes although references to common procedures should be used whenever applicable.

***HVAC Applications***

Applications chapters provide information to help the design engineer use the equipment and systems described in other handbooks. Applications chapters describe how equipment should be used and what to consider when designing for the application being described. The information helps the system designer select and use equipment properly. It does not describe how to design components or equipment.

These chapters describe the use of heating, air-conditioning, and ventilating equipment and systems to provide desired conditions. They address principles of operation and the effect of design parameter changes.

***HVAC Systems and Equipment***

System-oriented chapters cover the various common systems and illustrate features and differences. They refer to other chapters for basic design procedures.

Equipment-oriented sections or chapters cover components or assemblies. The information helps the system designer select and operate equipment. It does not describe how to design components.

These chapters survey available equipment and describe its operation and construction features. They address principles of operation and the effect of design parameter changes.

**Excerpt from the Handbook Committee Manual of Procedures (MOP):**

## **1.0 HANDBOOK CONTENT AND PHILOSOPHY**

**1.1** The ASHRAE Handbook is the recognized authority on current engineering procedures and practices in the fields of heating, refrigeration, air conditioning, and ventilation. The Society publishes the handbook primarily to provide technical information and data for the design engineer. The information is directed at those who understand engineering principles and use the information as a checklist of procedures, for design data, and to review current industry practices. Typical users include consulting engineers, design engineers, plant engineers, contractors, and engineering students.

**1.2** The handbook is published each year in electronic form as the eBook. In addition, a hard copy series, which also includes all four volumes, is published in a four-year, repeating sequence as follows:

Fundamentals

Refrigeration

HVAC Applications

HVAC Systems & Equipment

One paper volume is published each year as a "snapshot" of the printable portion of the related current volume in the eBook. The handbook, both electronic and paper, is published in two editions. One edition contains Inch-Pound (I-P) units of measurement and the other contains the International System (SI) of units.

**1.3** The general content and philosophy of the volumes are as follows:

**1.3.1 Fundamentals** covers the basic principles and data for the entire technology of the industry, including the following:

Theories and engineering concepts

Data on general subjects applicable to many specific fields

Data on basic working materials

Methods of calculating load requirements

Established data on such relatively unchanging subjects as pressure loss data and duct and pipe sizing

**1.3.2 Refrigeration** covers refrigeration equipment and systems in a particular application, process, or cold storage facility and addresses current design for specific applications.

**1.3.3 HVAC Applications** describes the use of heating, air-conditioning, and ventilation equipment and systems that provide desired conditions in a particular building occupancy or accomplish a specific purpose, and the use of equipment in particular applications.

**1.3.4 HVAC Systems and Equipment** describes both the combinations of equipment and the components or assemblies that perform a particular function either individually or in combination.

**MBO Status**

Handbook Committee  
 Chairman: Kenneth W. Cooper  
 Society Year: 2002- 2003  
 Date: January 2003

**Attachment C**

Objective	Planned Completion Date	Fiscal Impact	Responsible Subcommittee	Status	Comment
Develop a plan to address the BOD request for 'more practical information'	June 2003	?	Action plan	Ongoing, there are various initiatives between TAC and HB	There is a perceived need for the handbooks to be more 'practical.' There is also a need to continue development of electronic versions for the future
Implement formal HBC liaison basic training	June 2003	None	Training	Ongoing, the training committee has begun work	We spend a lot of time trying to be sure the TC committees know what to do, while liaison knowledge is passed by word of mouth. We need to fix this.
Pilot electronic enhancement program	Ongoing	?	Electronic Enhancement	Ongoing, Subcommittee working with 8 TC's	Continuation of existing program working with 9 TC's
HBC/TAC pilot program	Ongoing	?	Excom	Ongoing, Chair of HB on TAC oversight subcommittee	Continuation of existing program
Information presentation to members	Jan 2003	?	Strategic Plan	Draft plan assembled Oct 2002. Revisions and presentation this meeting	Explore alternatives.
Overall review of HB Content for Handbook volumes	June 2003	None short term	All Members	Ongoing, TAC oversight committee also working on review	Coordinated review by HBC members and key others to present recommendations for obsolete, revised and new info for HB series.  Info missing such as 'direct fired gas heat'.  Review chapters for appropriate complexity and presentation of information.  Consider both print and e-Book

Ken views things like 'orientation workshop for TC revisers as things that are ongoing and do not need an MBO to reflect their completion.

**Attachment D (see AHR List at [www.ashrae.org](http://www.ashrae.org) under Handbook Committee Participation)**

**Attachment E (see Chapter Status at [www.ashrae.org](http://www.ashrae.org) under Handbook Committee Participation)**

**3.6 Resolution of Disputes**

- 3.6.1 A dispute is defined as a major difference of opinion or fact with part or all of a chapter that is brought to the attention of the Handbook Committee and which could impact on the credibility or reputation of ASHRAE.
- 3.6.2 The Handbook Committee shall ensure that the dispute is handled professionally, fairly, and without bias.
- 3.6.3 The following procedure shall be followed to resolve a dispute:
  - 3.6.3.1 The Handbook Liaison determines that a conflict is occurring within a Technical Committee.
  - 3.6.3.2 The Handbook Liaison brings the concern to the Handbook Volume Chair, and notifies the entire Handbook Committee.
  - 3.6.3.3 The Handbook Volume Chair and Handbook Liaison meet with the conflicting parties to attempt to resolve the situation.
  - 3.6.3.4 A Handbook Committee Resolution Team, consisting of the Handbook Chair, Volume Chairs, and Director-at-Large (DAL), is formed.
  - 3.6.3.5 At this point, ASHRAE Attorneys will be notified and conflicting parties must agree to be bound by the Handbook Committee Resolution Team report.
  - 3.6.3.6 Handbook Committee Resolution Team meets with the conflicting parties.
  - 3.6.3.7 It is hoped the conflict will be resolved within one of the above steps; however, if the conflict is still continuing, the Handbook Committee Resolution Team will vote on one of the following:
    - 1. Accept one side, with overwhelming technical evidence.
    - 2. Remove the chapter entirely.
    - 3. Republish the previous chapter.
  - 3.6.3.8 The results of the dispute are reported to the Publication Council.

**To:** Ken Cooper, Chair  
Mark Owen, ASHRAE staff liaison

**From:** Bill Fleming, 2005 Fundamentals  
Brian Rock, 2003 Applications

**Subject:** Action Item # 4 of Handbook Committee Strategic Planning/Executive Subcommittee Meeting (Review revised Commercialism Policy re: effect on Handbook procedures and bring recommendations to Jan. 2003 meeting)

Mr. Brian Rock and I have reviewed the revised commercialism policy. Mr. Rock came up with the following suggestions. I have looked at the revision guide and placed subject suggestions into the document. I believe the suggestions are most appropriate.

The following two (2) suggestions are provided by page number, subject and recommendation. These suggestions should allow completion of action item # 4.

1. P 1, Philosophy, add a new paragraph at its end:

The ASHRAE Handbook and the Society's scope includes all aspects of HVAC&R technology. As such, commercialism is to be avoided and differing technologies are to be presented accurately in the Handbook. Materials prepared for publication in the Handbook must be written and critically reviewed by the responsible Technical Committee to ensure that it is free of bias.

2. P. 8, Chapter Review Checklist, insert as a new #16 (and change the existing 16 and 17 to 17 and 18):

# 16. Has all commercialism and bias been removed? All technologies presented accurately?

**Draft Strategic Emphasis for Handbook Committee**

October 6, 2002

Focus the efforts of the Handbook Committee on coordination and reorganization of Handbook information for electronic presentation.

**Handbook Content**

- Provide review of individual chapters to assure that they meet Reviser Guide criteria.
- Solicit, organize and review comments from the membership on the needs of the membership at large. Revise and update the Reviser Guide to agree with these needs.

**Public relations/publicity**

- Be more proactive in publicizing the member benefits and improvements in the eBook information.
- Utilize the ongoing efforts of TAC and Handbook to review the Handbook and provide positive publicity of the improvements generated
- Utilize Handbook committee members and others outside the TC to get better definitions of “what’s new” in the revision.

**Handbook committee**

- Investigate, understand and assimilate the changing nature of the committee structure, responsibilities and duties required by the needs of electronic presentation.
- Provide a structured training course for new and existing Handbook committee members so that duties and responsibilities are clearly delimited.

**Technical Committees**

- Review and update the Author and Reviser’s Guide for electronic presentation and better coordination with TAC and the TCs.
- Improve references to all other ASHRAE information in the eBook (e.g.: Special Publications, Standards). Utilize TC members to identify such references.

**Structure**

- Review current policies on electronic enhancements and make recommendations on appropriateness of various types for inclusion in the eBook and or other places such as Special Publications.
- Review and make recommendations for publication of Handbook material in other languages in light of the electronic possibilities.
- Investigate and make recommendations on the usefulness/feasibility of varying revision schedules for different types of material (e.g.: shorter for applications info, longer for basic data). Utilize the results to provide positive publicity of continuing Handbook improvements.
- Provide guidance in the electronic presentation of information to pass on to TCs as needed.