



# BUILDING COMMISSIONING ASSOCIATION



2010

## Marketing Plan

Analysis, goals and strategies for promoting and expanding the BCA's visibility, relationships, membership, deliverables and certification while continuing to meet the needs of existing members, who represent all sectors of the building industry.

# Building Commissioning Association

## 2010 MARKETING PLAN

### EXECUTIVE SUMMARY

The 2010 Marketing Plan addresses marketing strategies for the Building Commissioning Association. Each association Committee and Chapter plays an integral role in advancing the awareness and promoting the value of the BCA. Spearheaded by the Marketing and Outreach Committee, 2010 marketing efforts are designed to tie into the plans for association Committees and Chapters.

One resource for goals contained in The Marketing Plan was a Spring 2008 study performed by Schroeder Measurement Technologies (SMT). This study conducted marketing analysis of the industry's perception of the Building Commissioning Association and the Certified Commissioning Professional designation. Survey responses showed that the BCA is a recognizable and creditable organization within the commissioning industry. However, the BCA and the CCP program are not able to differentiate themselves from other industry organizations and certifications, which creates market confusion for owners and decision makers who do not see the value difference between a LEED® Accredited Professional and a CCP certified professional. Responses also reported that to outside entities, the BCA is perceived as an exclusive organization for only highly-experienced commissioning providers, while existing BCA members expressed a desire to be "more connected" to chapters.

This information prompted the following Marketing Goals:

- Raise the BCA's visibility nationally and internationally
- Reinforce the BCA's image as an authority in the industry
- Differentiate the BCA from its competitors and other similar organizations
- Promote the BCA's resources, particularly in industry publications
- Create demand from owners who will request the CCP designation as preferable commissioning consultants
- Expand the BCA's membership segmentation to encompass both providers and user of commissioning while enhancing member benefits
- Increase the BCA's new member sign-up rate by 20% in 2010
- Cultivate stronger chapters and greater volunteerism
- Develop industry partnerships

The Marketing Plan is structured as a report with working Appendices. The Plan contains discussion of each of the Marketing Goals. In addition, the Plan contains marketing analysis such as a SWOT assessment, Measurement and Results for marketing tactics, competitive assessment, etc. There are four appendices to the Plan.

1. Appendix A - Marketing Task Matrix – identifying the Marketing Goal, Strategy, Tactic, Responsible Entity, and Priority for the association.
2. Appendix B – Geographic Data for BCA Members, Certified Commissioning Professionals, and ACG Certified Commissioning Authorities – providing market data on the various competitors of the CCP.
3. Appendix C – Key Marketing Messages by Segment – summarizing the benefits provided by the BCA to each of our 2010 key audiences: Owners / Users of Commissioning and Providers.
4. Appendix D – Marketing Timeline – identifying projected timeframes for completion of the Marketing Plan tactics.
5. Appendix E – BCA Leadership Survey Results – summarizes responses to the mission, vision, goals survey issued by BCA Staff prior to the 2010 Leadership Retreat.

## MARKETING TASK MATRIX BY ENTITY

### THE FOLLOWING REORGANIZES THE APPENDIX A: MARKETING TASK MATRIX BY ENTITY:

- CHAPTERS
- PROFESSIONAL DEVELOPMENT AND EDUCATION COMMITTEE
- STANDARDS COMMITTEE
- Certification Committee
- Marketing and Outreach Committee
- PECEI Staff

The information below is a reformatted version of Appendix A. Reference numbers for Strategy and Tactic refer to the Appendix A formatting.

## CHAPTERS

<b>Marketing Objective 1:</b> Facilitate member benefits that increase membership, certification, and association activism		
<b>Strategy 1:</b> <i>Develop and communicate benefits attractive to Owners</i>		<i>Priority</i>
<b>Tactic #3</b>	Present Owner-oriented presentation in each region. Use membership list plus local Owners as attendee list. The topics will be: 1) Owner's Project Requirements and Basis of Design information and 2) Existing Building Commissioning Best Practices.	A
<b>Strategy 2:</b> <i>Develop and communicate benefits attractive to Providers</i>		<i>Priority</i>
<b>Tactic #3</b>	Present Provider-oriented presentation in each region. Use membership list plus local providers and design professionals as attendee list. Topics will be the: 1) Owner's Project Requirements and Basis of Design and 2) Existing Building Commissioning Best Practices.	A
<b>Strategy 3:</b> <i>Encourage volunteerism at Committee and Chapter level.</i>		<i>Priority</i>
<b>Tactic #3</b>	Recognize names of Committee and Chapter members. Each Newsflash, do member focuses – one for committee and one for chapter. Introduce the leaders in our organization to each other and to the membership.	B

<b>Tactic #4</b>	Chapters to identify one member to participate on the committees.	A
<b>Tactic #5</b>	Marketing and Outreach Committee to provide marketing templates and resources for the Chapter use.	A
<b>Marketing Objective 2: Develop and maintain the best practices on the commissioning process</b>		
<b>Strategy 1: Promote and increase the awareness of the BCA Best Practices at all levels of participants</b>		<b>Priority</b>
<b>Tactic #3</b>	Assist chapters redesigning their chapter websites to become a promotional tools for BCA	C
<b>Tactic #4</b>	Conduct one event on the Building Commissioning Best Practices in each region. Topic will be Existing Building Commissioning Best Practices.	B
<b>Marketing Objective 4: Market the Certified Commissioning Professional (CCP) to be the most recognizable credential for commissioning professionals</b>		
<b>Strategy 1: Develop a marketing campaign to promote CCP within the BCA chapters</b>		<b>Priority</b>
<b>Tactic #1</b>	Utilize local chapters to launch grassroots marketing efforts through chapters' websites and local connections.	A
<b>Tactic #2</b>	Develop a mentoring system for BCA members who want to take the certification test (ex. Develop study groups at chapters)	C
<b>Marketing Objective 5: Establish an ongoing collaborative relationship with related organizations within the building industry</b>		
<b>Strategy 1: Identify target organizations to collaborate</b>		<b>Priority</b>
<b>Tactic #1</b>	Sponsor two chapter events regionally: USGBC event and AIA event.	A
<b>Tactic #2</b>	Research event speaking opportunities at local industry conferences and follow through on presentations.	B

PROFESSIONAL DEVELOPMENT AND EDUCATION COMMITTEE

<b>Marketing Objective 2: Develop and maintain the best practices on the commissioning process</b>		
<b>Strategy 1: Promote and increase the awareness of the BCA Best Practices at all levels of participants</b>		<b>Priority</b>
<b>Tactic #1</b>	Maintain diverse webinar content addressing issues and topics for providers and users of commissioning.	A
<b>Tactic #5</b>	Present BCA Best Practices message at national events. Those targeted = AIA and Greenbuild for 2010.	A
<b>Strategy 3: Encourage members to share their knowledge and practices using both inward and outward facing media venues</b>		<b>Priority</b>
<b>Tactic #2</b>	Post education events, such as webinars, on iTunes and other mediums.	B
<b>Marketing Objective 3: Assure continuing professional education that meets the BCA's best practices</b>		

<b>Strategy 1:</b> Utilize various media channels to conduct training courses		<b>Priority</b>
<b>Tactic #2</b>	Create quarterly Podcasts (15 mins. max) on variety of smaller topics on building commissioning and publish them on BCA website and iTunes	C
<b>Tactic #3</b>	Offer on-site commissioning training programs to organizations, associations, Owners, etc. on a topic of their choosing.	A
<b>Strategy 2:</b> Work with PECl to create next generation training curriculum		<b>Priority</b>
<b>Tactic #1</b>	Identify curriculum topics and trainers to teach the courses	A

## STANDARDS COMMITTEE

<b>Marketing Objective 2:</b> Develop and maintain the best practices on the commissioning process		
<b>Strategy 2:</b> Continue to conduct research in order to develop the content for the next edition of Best Practices in new and existing buildings		<b>Priority</b>
<b>Tactic #1</b>	Support Standards committee in promoting the Commissioning for New Construction Best Practices via three 2011 abstract submissions.	A
<b>Tactic #2</b>	Prepare website update and e-mail mailer for the Existing Building Commissioning Guide package.	A

## CERTIFICATION COMMITTEE

<b>Marketing Objective 4:</b> Market the Certified Commissioning Professional (CCP) to be the most recognizable credential for commissioning professionals		
<b>Strategy 1:</b> Develop a marketing campaign to promote CCP within the BCA chapters		<b>Priority</b>
<b>Tactic #2</b>	Develop a mentoring system for BCA members who want to take the certification test (ex. Develop study groups at chapters)	C
<b>Tactic #3</b>	Work with BCA corporate members to develop a career path that includes building the qualifications for their employees to become CCP candidates	C

## MARKETING AND OUTREACH COMMITTEE

<b>Marketing Objective 1:</b> Facilitate member benefits that increase membership, certification, and association activism		
<b>Strategy 1:</b> Develop and communicate benefits attractive to Owners		<b>Priority</b>
<b>Tactic #1</b>	Communicate offer of Project Postings to Owner's for free. Prepare a list of universities, hospitals, K-12, commercial building owners, etc. Send information along with a sample RFP from BCA's templates as well as a list of additional benefits.	A
<b>Tactic #2</b>	Revise the BCA webpage to add a page exclusively for Owners. On it, have Owner-focused "Calls to Action" such as: Post an RFP, Get a Referral, Find a Provider, Request Training Session, Find Commissioning Information, etc.	B

<b>Tactic #3</b>	Present Owner-oriented presentation in each region. Use membership list plus local Owners as attendee list. The topics will be: 1) Owner's Project Requirements and Basis of Design information and 2) Existing Building Commissioning Best Practices.	A
<b>Strategy 2:</b> <i>Develop and communicate benefits attractive to Providers</i>		<b>Priority</b>
<b>Tactic #1</b>	Communicate offer of Process Templates and Webinars to providers. Prepare a list of provider firms. Send information along with a sample Cx Plan or Functional Test from BCA's templates as well as a list of additional benefits.	A
<b>Tactic #2</b>	Revamp the BCA webpage to add a page exclusively for Providers. On it, have Provider focused "Calls to Action" such as: Post or Find a Job, Find a Project, Request Training Session, Find Commissioning Information, etc.	B
<b>Tactic #3</b>	Present Provider-oriented presentation in each region. Use membership list plus local providers and design professionals as attendee list. Topics will be the: 1) Owner's Project Requirements and Basis of Design and 2) Existing Building Commissioning Best Practices.	A
<b>Strategy 3:</b> <i>Encourage volunteerism at Committee and Chapter level.</i>		<b>Priority</b>
<b>Tactic #1</b>	Create an active and usable writer's bureau.	A
<b>Tactic #2</b>	Create an active and usable speaker's bureau.	A
<b>Tactic #3</b>	Recognize names of Committee and Chapter members. Each Newsflash, do member focuses – one for committee and one for chapter. Introduce the leaders in our organization to each other and to the membership.	B
<b>Tactic #4</b>	Chapters to identify one member to participate on the committees.	A
<b>Tactic #5</b>	Marketing and Outreach Committee to provide marketing templates and resources for the Chapter use.	A
<b>Strategy 4:</b> <i>Develop BCA Value Propositions.</i>		<b>Priority</b>
<b>Tactic #1</b>	Create BCA value propositions for: users, providers, and utilities.	A
<b>Tactic #2</b>	Update BCA website, Checklist, Newsflash, and committee and chapter resources with the value propositions.	A
<b>Marketing Objective 2:</b> <i>Develop and maintain the best practices on the commissioning process</i>		
<b>Strategy 1:</b> <i>Promote and increase the awareness of the BCA Best Practices at all levels of participants</i>		<b>Priority</b>
<b>Tactic #2</b>	Revise the BCA resource webpage to include more industry resources.	C
<b>Tactic #3</b>	Assist chapters redesigning their chapter websites to become a promotional tools for BCA	C
<b>Tactic #4</b>	Conduct one event on the Building Commissioning Best Practices in each region. Topic will be Existing Building Commissioning Best Practices.	B
<b>Tactic #5</b>	Present BCA Best Practices message at national events. Those targeted = AIA and Greenbuild for 2010.	A
<b>Strategy 2:</b> <i>Continue to conduct research in order to develop the content for the next edition of Best Practices in new and existing buildings</i>		<b>Priority</b>
<b>Tactic #1</b>	Support Standards committee in promoting the Commissioning for New Construction Best Practices via three 2011 abstract submissions.	A
<b>Tactic #2</b>	Prepare website update and e-mail mailer for the Existing Building Commissioning Guide package.	A

<b>Strategy 3:</b> Encourage members to share their knowledge and practices using both inward and outward facing media venues		Priority
<b>Tactic #1</b>	Maintain and Expand BCA's social media presence to facilitate knowledge transfer, drive the traffic to the BCA website, promote events, poll membership, etc.	B
<b>Tactic #2</b>	Post education events, such as webinars, on iTunes and other mediums.	B
<b>Marketing Objective 3:</b> Assure continuing professional education that meets the BCA's best practices		
<b>Strategy 1:</b> Utilize various media channels to conduct training courses		Priority
<b>Tactic #2</b>	Create quarterly Podcasts (15 mins. max) on variety of smaller topics on building commissioning and publish them on BCA website and iTunes	C
<b>Tactic #3</b>	Offer on-site commissioning training programs to organizations, associations, Owners, etc. on a topic of their choosing.	A
<b>Marketing Objective 4:</b> Market the Certified Commissioning Professional (CCP) to be the most recognizable credential for commissioning professionals		
<b>Strategy 1:</b> Develop a marketing campaign to promote CCP within the BCA chapters		Priority
<b>Tactic #1</b>	Utilize local chapters to launch grassroots marketing efforts through chapters' websites and local connections.	A
<b>Strategy 2:</b> Develop a marketing campaign to promote CCP externally		Priority
<b>Tactic #1</b>	Share message to owners about the high return values of hiring a CCP certified provider.	A
<b>Tactic #2</b>	Develop a CCP brochure for use at tradeshow and events.	C
<b>Tactic #3</b>	Differentiate and publicize CCP from other similar types of certifications.	A
<b>Tactic #4</b>	Testimonial ads on other industry or certification websites for engineers or energy efficiency professionals, as budget allows.	C
<b>Marketing Objective 5:</b> Establish an ongoing collaborative relationship with related organizations within the building industry		
<b>Strategy 1:</b> Identify target organizations to collaborate		Priority
<b>Tactic #1</b>	Sponsor two chapter events regionally: USGBC event and AIA event.	A
<b>Tactic #2</b>	Research event speaking opportunities at local industry conferences and follow through on presentations.	B
<b>Strategy 2:</b> Share case studies with other publications and organizations		Priority
<b>Tactic #1</b>	Work with other organization's publications to publish commissioning articles written by BCA members.	C
<b>Tactic #2</b>	Create RSS feed for the Checklist to generate awareness to other publications	B
<b>Tactic #3</b>	Revamp the editorial content of the Checklist as a better resource for the members, chapters and the commissioning industry	A

## PECI STAFF

<b>Marketing Objective 1: Facilitate member benefits that increase membership, certification, and association activism</b>		
<b>Strategy 1: Develop and communicate benefits attractive to Owners</b>		<b>Priority</b>
<b>Tactic #2</b>	Revise the BCA webpage to add a page exclusively for Owners. On it, have Owner-focused "Calls to Action" such as: Post an RFP, Get a Referral, Find a Provider, Request Training Session, Find Commissioning Information, etc.	B
<b>Tactic #3</b>	Present Owner-oriented presentation in each region. Use membership list plus local Owners as attendee list. The topics will be: 1) Owner's Project Requirements and Basis of Design information and 2) Existing Building Commissioning Best Practices.	A
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<b>Tactic #5</b>	Present BCA Best Practices message at national events. Those targeted = AIA and Greenbuild for 2010.	A
<b>Strategy 2: Share case studies with other publications and organizations</b>		<b>Priority</b>
<b>Tactic #3</b>	Revamp the editorial content of the Checklist as a better resource for the members, chapters and the commissioning industry	A

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## APPENDICES

*Appendix A: Marketing Task Matrix*

*Appendix B: Geographic Data for BCA Members, Certified Commissioning Professionals (CCP) and ACG Certified Commissioning Authorities (CxA)*

*Appendix C: Key Marketing Messages by Segment*

*Appendix D: Marketing Event and Materials Timeline*

*Appendix E: BCA Leadership Survey Results*

# 1 INTRODUCTION

## PURPOSE

The Marketing and Outreach Committee was tasked with the development of the 2010 BCA Marketing Plan. The committee analyzed data from outside marketing entities, BCA Management Staff and an internal member survey. The Marketing Plan was reviewed by the International Board of Directions, Committee Chairs, and Chapter Leadership during the association's annual Leadership Retreat. The review validated alignment of the marketing objectives with the BCA's strategic goals.

The purpose of the Plan is to translate the association goals established by leadership into strategic actions and tactics. The Plan is also meant to address marketing strategies for the Building Commissioning Association as an entire organization, not solely the Marketing and Outreach Committee. Therefore, the goals and tasks outlined in this plan are designated to various staff, committees, and chapters for accomplishment.

## MARKETING DATA ANALYSIS

Two sets of data analysis form the basis for the conclusions and strategies contained within this plan. The first is a spring 2008 study the Building Commissioning Association (BCA) authorized Schroeder Measurement Technologies (SMT) to conduct. The SMT study analyzed the BCA's Certified Commissioning Professional (CCP) program. To evaluate the vitality of the CCP designation and the values of the BCA membership, 99 selected participants who were BCA members, non-members and other professionals in the commissioning industry were surveyed according to SMT's final report.

Survey responses from the SMT study revealed key market information not only related to the CCP program, but also relating to the BCA. The survey responses showed that the BCA is a recognizable and creditable organization within the commissioning industry. However, the BCA and the CCP program are not able to differentiate themselves from other industry organizations and certifications, which creates market confusion for owners and decision makers who do not see the value difference between a LEED® Accredited Professional and a CCP certified professional.

The SMT study responses also reported that to outside entities, the BCA is perceived as an exclusive organization for only highly-experienced commissioning providers, while existing BCA members expressed a desire to be "more connected" to chapters.

The second data set is an association leadership survey completed by the BCA in January 2010. The survey polled Board, Committee, and Chapter leaders on their impressions and suggestions for BCA work products and involvement. The survey further determined leadership's buy-in to the association's mission and agreement with the association's goals and objectives.

Responses revealed that the BCA leadership agreed with the three pronged mission of the association: 1) education, 2) best practices, and 3) promotion of the industry. Respondents revealed a disconnect between committees, chapters, board, and membership. There is a desire for increased focus and positioning of the CCP certification and the BCA templates. The Essential Attributes and Best Practices were affirmed as having high value to respondents. A full list of findings is contained in Appendix E.

The Marketing and Outreach Committee used this information plus the association leadership's experience and insight to analyze and develop the 2010 Marketing Plan. The Marketing Plan attempts to address identified issues, while also developing a plan to expand advertising and promotion of the association as a whole within the building industry.

## SPECIFIC MARKETING GOALS INCLUDE:

At the 2010 Leadership Retreat, the strategic goal established for promoting the commissioning industry was: **Define and refine the BCA's commissioning portfolio and demonstrate its value to the building industry stakeholders.** In order to accomplish this goal and support the efforts of all Committees and Chapters, the following Marketing Goals for 2010 are of high priority.

- Determine and promote the BCA's value proposition in the marketplace
- Promote the BCA's Commissioning Guide as developed by the Standards Committee
- Increase awareness and promote the revenue generating activities of the BCA: education, membership, tools, certification, and sponsorship
- Support the BCCB in creating demand from both owners, providers and other industry groups for the CCP designation
- In 2010, develop and utilize industry partnerships to accomplish the following ends:
  - GSA: Policy-level adoption of the BCA's commissioning portfolio with regional consistency in its reference and recommendations
  - USGBC: Adoption of the BCA's commissioning portfolio in the next LEED rating system revision. Leadership of the commissioning certification minimum standards discussions.
  - AIA: Incorporation of BCA's recommended language in AIA Contract documents.

A matrix of the tasks and responsibilities to accomplish these goals is available in Appendix A of this report; a timeline of marketing events and materials is presented in Appendix D.

To support these goals, the Marketing Plan outlines 1) the importance of Chapter and Committee support, 2) the analysis of the BCA's competitors, and 3) a SWOT Analysis, determining the Strengths, Weaknesses, Opportunities, and Threats to the Association. These outlines are supplemented with discussions of each goal and descriptions of common marketing resources the BCA can use to implement a comprehensive marketing program.

## STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREAT (SWOT) ANALYSIS

The SWOT was based on the data gathered, and used to develop further specific strategies to increase the BCA's visibility and viability with members as well as non-members and other organizations.

Strengths	Weaknesses
<p><i>Led by the most qualified and experienced commissioning providers in the country</i></p> <p><i>Active and imaginative membership base dedicated to BCA's growth</i></p> <p><i>Known as an organization with high standards</i></p> <p><i>Members producing high quality of commissioning work</i></p> <p><i>Newly released CCP Exam, currently available in electronic format</i></p> <p><i>Attributes-driven commissioning focus rather than prescriptive commissioning process</i></p> <p><i>Owner-friendly commissioning organization</i></p> <p><i>Active creation of webinar, document, and presentation materials</i></p>	<p><i>CCP Awareness</i></p> <p><i>Targeted and disseminated BCA and CCP benefits</i></p> <p><i>Accessibility and variety of commissioning resources</i></p> <p><i>Volunteerism at committee level</i></p> <p><i>Volunteerism at chapter level</i></p> <p><i>Funding for development and implementation of programs</i></p> <p><i>Industry recognition</i></p> <p><i>Turn-around time on deliverables and action items</i></p> <p><i>Collaboration among committees and chapters</i></p> <p><i>Leveraging on-line resources to maximize BCA and CCP presence</i></p>
Opportunities	Threats
<p><i>Accomplish end goals for key industry partners identified in the M&amp;O Goals</i></p> <p><i>Packaging of BCA's commissioning tools into comprehensive commissioning programs for New Construction and Existing Buildings</i></p> <p><i>Combination of BCA Expo with NCBC</i></p> <p><i>Develop commissioning training curriculums and offer in broadcast, downloadable, and personal formats</i></p> <p><i>Serve as commissioning training entity for national trade associations: e.g. AIA, USGBC, ASHRAE, IFMA, etc.</i></p> <p><i>Regionalization of BCA's presence and focus for events, conferences, articles, speaking, and activism</i></p> <p><i>Collaborate with other industry organizations</i></p> <p><i>Lead commissioning-related associations in discussions about certification</i></p> <p><i>Build BCA and CCP reputation to building owners and providers</i></p>	<p><i>Lack of focus and time required in order to align BCA with identified industry stakeholders</i></p> <p><i>Competitors have broader membership base for funding and recruiting (ex. ASHRAE, ACG, LEED, etc.)</i></p> <p><i>Increase in building commissioning certification programs (ex. ASHRAE, CPMP, CBCP, CxA &amp; QCxP)</i></p> <p><i>Regularity and availability of competitor's education and certification programs</i></p> <p><i>Commoditization of commissioning by the building industry</i></p> <p><i>Internal prioritization of opportunities and action items i.e. spreading volunteers "too thin"</i></p> <p><i>Siloed communication between committees and chapters</i></p> <p><i>Size of regional chapters too large to allow for the feeling of localized community</i></p> <p><i>Reliance on volunteer base for major work products</i></p>

## ASSOCIATION SUCCESS

While the threats, weaknesses, and opportunities listed in the previous section (in addition to the marketing data and surveys) allow us to focus on what we can do to improve our organization, it is important to be mindful of our successes, strengths and opportunities as areas of further growth.

BCA's Essential Attributes define a standard of commissioning care completely unique to the industry. While other organizations define prescriptive commissioning procedures, the BCA Essential Attributes foster flexibility and adaptability to commissioning each project without sacrificing process quality. The written commitment of each Member upon joining the BCA is unique in that individuals uphold the Essential Attributes regardless of their role in the commissioning industry. The goal is to protect and maintain the quality process, not an individual. This creates a sense of community among members.

Community and camaraderie among members is a palpable trait of the BCA. The relationships and networking opportunities fostered are a product of professional respect, commitment to a common code of ethics (Essential Attributes), passion for revolutionizing the building industry, and membership composition. Providing benefits in terms of knowledge-transference, partnership and teaming, support, and encouragement among others means that BCA members receive much more than seminars, training, and opportunities for certification.

The technical capabilities of the BCA surpass those of any other commissioning association in the world. Content presented by the association in the form of articles, webinars, presentations, process templates, case studies, etc. surpasses any direct association competitor. This is possible due to the experiential background of BCA members.

Owners provide a unique focus while members capable of the CCP designation represent the best in the industry. Finally, the volunteer base of technical product authors means that a variety of perspectives contributes to content. The BCA doesn't rely on the experience of two or three individuals; material comes from experts in areas such as insurance, contract language, facility management, development, testing, controls, etc.

Certification is a key branch of the BCA offering. Achievement of a Certified Commissioning Professional designation is reserved for providers with education, experience, references, and knowledge in the commissioning process. The CCP is levels above certifications offered by other associations. The difference is demonstrated experience. Most of the other certifications merely seek pre-requisite education, license in another field of practice, and successful completion of a memorization-driven exam. There is no other certification that measures the candidate's ability to apply commissioning process activities in reality. Therefore, the BCA represents the most skilled professionals in the industry.

Other strengths solidify the BCA's position as a forerunner in the commissioning industry. The BCA's challenge is advancing that position, communicating our advantages clearly to the marketplace, and consistently demonstrating the differences the BCA makes to the building industry.

*Other strengths solidify the BCA's position as a forerunner in the commissioning industry. The BCA's challenge is advancing that position, communicating our advantages clearly to the marketplace, and consistently demonstrating the differences the BCA makes to the building industry.*

## 2 Creating Value Propositions and Developing Relationships

Part of a promotion effort begins with defining a clear and compelling value proposition. While the specific benefits to the BCA membership may vary depending on the respondent, the value to the entire industry should be conveyed succinctly. At the Leadership Retreat, it became clear that the BCA's value proposition is ill-defined. Of great importance for the Association is defining the BCA's value and communicating it to the market.

Two types of value proposition messages are needed: one for the industry as a whole to be used on marketing collateral and in member conversations. The other would be stakeholder-specific, crafted to one of the three target organizations for 2010: USGBC, GSA, and AIA.

Developing these messages should be vetted against association leadership, especially committee leadership, for their input and modifications. A key component of the value propositions is their delivery.

The Leadership Retreat in early 2010 identified specific objectives for USGBC, GSA, and AIA relationship development. Accomplishing those ends is not solely limited to efforts from the Marketing and Outreach Committee although M&O Committee leadership was requested.

The International BCA Board of Directors, BCA Staff, and other leaders present at the retreat committed to assisting in implementation of targeted outreach steps. Ultimately, it was determined at the 2010 BCA Leadership Retreat that the Executive Director would spearhead this effort; this recommendation was made to the Board for consideration. Until this decision is voted on, there are specific timetables the association needs to meet in order to assure success.

The development of a plan for delivering key stakeholder value propositions is of great urgency to the association. The task for their initial development has been given to the Marketing and Outreach Committee. The tasks and timeframes are included in this report in Appendix E.

## 3 Increasing BCA Visibility and Promoting the BCA's Expertise

Considering the strengths of the association is an important part of the 2010 Marketing Plan. It is this information that must be used to increase further the importance and status of the BCA within the building industry as a whole.

Because of the many other organizations that have commissioning certifications, standards, and guidelines, it is critical that the BCA increase its visibility--locally, nationally, and internationally.

**However, establishing the BCA as the highest level of commissioning expertise is the most critical task of the association.**

This is accomplished through marketing, promotion and strengthening industry relationships externally, while increasing volunteerism and participation internally.

Being known as the expert in commissioning will increase desirability for participation with the BCA. This will increase the success of meeting all marketing goals and strengthening our organization. Once seen as the commissioning industry expert, the BCA will:

- increase membership
- broaden membership categories
- increase the demand for deliverables (materials, education, webinars, etc.)
- increase the value of utilizing and achieving the CCP
- increase volunteerism and chapter participation
- develop a demand for participation in publications and at conferences
- result in greater level of sponsorship

The task of being seen as the expert among other industry organizations is not achieved through one task or goal; it is through the culmination of all of the tasks in this plan being met. Many tasks and strategies developed in this plan are ways to communicate better existing marketing deliverables.

However, there are **new** tasks which can be accomplished by the association staff, BCA volunteers, and members. Part of the 2010 Marketing Plan includes goals for revitalizing volunteerism in both chapters and committees. But the tasks must be completed.

All tasks and strategies are documented in Appendix A of this report, designating the responsible entity for each item.

**It is important that all members, particularly those who participate in chapter and committee activities, be deliberate in responding to the task of showing the BCA as the industry expert on commissioning. This is done by utilizing each individual's expertise on behalf of the BCA—thus promoting the BCA and the true process of commissioning.**

## GENERAL ASSOCIATION MARKETING TASKS: MEASUREMENT AND RESULTS

Outside of specific strategies and tasks for chapters and committees to promote the deliverables of the BCA, the Association Staff has established metrics to track marketing tactics' success.

The association marketing goals include enhancing typical marketing venues through the use of media technologies for tracking and follow-up. Measuring the success of these tactics is also a valuable tool to setting priorities for the future.

A matrix of these Tactics, Approaches, Tracking Tools, and Areas of Measurement is included in the following table:

Marketing Tactic	Approach	Tracking Tool	Area of Measurement
<p><b>Tradeshows</b> (For 2010: AIA, Greenbuild, NCBC, AHR, and GovEnergy)</p> <p><b>Audience</b> Providers, Strategic Partners, Owners, and Users of commissioning</p>	<p>Create messages that are specifically designed to target the attendees of the tradeshows. Messages will ask the recipients to take certain actions such as visiting BCA member's page or signing up for webinars, etc.</p>	<p>Track BCA website traffic, webinar sign up rates, or other call to action items during the tradeshows and 2-3 weeks afterward.</p> <p>Create follow-up opportunities at the booths. 1) BCA staff will make personal calls after the event and 2) Regionalized e-mail to attendee list with local chapter and Board representative contact info</p>	<p>Track the inventory of items that are brought to and given away at each tradeshow. The efforts will be measured by the responses during and after the tradeshow.</p>
<p><b>Print Deliverables</b> (For example: Webinar postcards, membership drive promotions &amp; Expo brochures)</p> <p><b>Audience</b> Providers, Strategic Partners, Owners, and Users of commissioning</p>	<p>Create special promo code for discounts for each deliverable when people sign up for membership, when they register for webinars, etc.</p>	<p>BCA staff will diligently ask about how people hear about BCA.</p> <p>Use of online registration tool to generate reports on the number of registrants who use the incentive codes.</p>	<p>The online report or staff's record will indicate the number of people who use the codes, therefore assisting in the calculation of the return rates for each deliverable.</p>
<p><b>Press Releases</b> (For example: Announcements of BCA local or national events &amp; BCA member's speaking engagements)</p> <p><b>Audience</b> Providers, Strategic Partners, Owners, and Users of commissioning</p>	<p>Create a PR schedule to promote the BCA chapter activities, webinars, conferences, podcasts, the <i>Checklist</i>, etc. The schedule will correlate with the activity dates, the editorial calendar, and the event timelines.</p>	<p>Track which media has picked up the press release by searching through Google or following up with the PR contacts who received media submissions.</p>	<p>PR efforts will be measured by capturing the registration and attendance rates at chapter's activities and the Checklist download rates from different demographics and media channels.</p>
<p><b>Online Event Registration and Incentives</b> (For example: BCA 2010 Expo, Chapter Events)</p> <p><b>Audience</b> Members, Providers, Owners</p>	<p>Promotional emails or mailers will drive potential attendees to online registration. Promotional pieces will include either a registration of promotional code to track target audiences, while providing early registration incentives when applicable. Short surveys will also be included when needed.</p>	<p>Use of existing tools such as RegOnline will allow for tracking number/type of registrants using the incentive codes, and also track the time-lag between when the mailer is sent and when people actually start registering.</p>	<p>Registration info will indicate which target segments are most interested in the particular event topics, and are inclined to register early given an incentive. Through survey results, the program can gather additional information such as how people hear about the events and which target audiences are most prone to attending.</p>

<p><b>e-marketing</b> (For example: Newsflash &amp; electronic version of the Checklist)</p> <p><b>Audience</b> Members</p>	<p>Include “call for action” items with hyperlinks that will lead the readers to the BCA or chapter’s websites.</p>	<p>Utilize e-marketing campaign tool to track stats on the click-through rate, click-to-action rate, visitor-path-tracking and information request rates (to an email address or phone number).</p>	<p>Use stats to evaluate popular links in e-newsletter. Use the mailing list report to ensure that the list stays current.</p> <p>Track the download rates for the Checklist.</p>
<p><b>Podcast or Social Media</b> (For example: Facebook, LinkedIn, blogs, Twitter, YouTube, iTunes, Google)</p> <p><b>Audience</b> Members, Students, Providers, Strategic Partners, Owners, and Users of commissioning</p>	<p>Create Podcasts, e-forum or blogs to raise BCA awareness nationally, and to drive traffic to BCA website. Upload the Podcasts to iTunes or YouTube for additional exposure.</p>	<p>Track web stats through Google Analytics or other web analytics reports (how many times a podcast has been downloaded, direct traffic, and referring sites and search engines).</p>	<p>Web stats can be used to assess and implement the most strategic placement of social media.</p>
<p><b>Targeted PR, Journal Articles, Print Ads &amp; Editorial Ads</b> (For example: BOMA, ASHRAE Journal &amp; Greensource)</p> <p><b>Audience</b> Members, Providers, and Owners</p>	<p>Create a unique URL that will direct readers to the web page and take action (e.g. Sign up for membership).</p> <p>Create several survey questions that will engage the viewers to answer.</p>	<p>Track BCA website using Google Analytics or other types of web analytics reports.</p> <p>Survey answers will be captured in backend SQL database.</p>	<p>Effectiveness of call to action.</p> <p>This method will drive target markets to the website, yielding email and phone requests for membership information.</p> <p>The response rates can be compared and analyzed.</p>

## 4 Differentiating from Competitors

Numerous organizations, associations, and agencies have commissioning guidelines and standards. Most are of value to the owner, design and construction team as well as the provider as they document the expected process that should be followed for the project. As compared to the BCA’s Best Practices, however, many are more vague, system specific, and do not specify what credentials the commissioning provider must possess.

More recently, exams and certifications have been developed by various entities to try to establish a qualification level of a provider for the benefit of owners and to increase the quality of the commissioning process in the industry as a whole.

In order to determine better a marketing course of action to provide a more attractive membership to the industry, the following chart analyzes the offerings of other organizations as it relates to commissioning, commissioning-certification and other commissioning-related offerings:

## COMPETITIVE ANALYSIS

Competitor	Organization Background	Certifications	Opportunities/Benefits	Membership Fee
<b>AABC Commissioning Group (ACG)</b>	ACG is a subsidiary organization of the Associated Air Balance Council (AABC), which manages associate membership, facilitates commissioning training and education, and administrates CxA certification process.	Certified Commissioning Authority (CxA) designation is awarded to the candidates who meet the specified qualifications and pass the certification exam. Certified Commissioning Technician (CXT) designation for field oriented personnel who have a certain number of years experience and pass the certification exam.	-RFP announcements -Networking w/ providers -Training workshops -Job Board -Committee activities: <ul style="list-style-type: none"> <li>• Membership</li> <li>• Specifications</li> <li>• Training and Education</li> <li>• Quality Assurance</li> <li>• Marketing</li> <li>• Certification</li> <li>• Annual Meeting Program</li> <li>• Commissioning Guideline</li> </ul>	Associate Membership: -\$250/year (same for renewal)  Certification Membership: -\$250/year (same for renewal) -Company Membership per location: \$1500/year
<b>The Association of Energy Engineers (AEE)</b>	AEE is a nonprofit professional society of firms or professionals who are in the energy efficiency industry with 9,500 members in 73 countries. It founded the Certified Energy Manager (CEM) program in 1981, which has certified 15,000 professionals.	There are total of 15 certification programs, and here are a few: Certified Energy Manager (CEM), an international program, Energy Manager in Training (EMIT), Certified Sustainable Development Professional (CSDP), Certified Carbon Reduction Manager (CRM), Certified Green, Building Engineer (GBE), Certified Building Commissioning professional (CBCP), etc.	-Discount on training programs, subscriptions to industry publications and professional services -Networking -Scholarship assistant for undergraduate engineering students -AEE award recognition -Job referrals -Discount with Bank of America credit cards, car rental services and insurance company -Event sponsorship opportunities -Career board	Membership (yearly): -Senior Member: \$180 -Individual Member: \$180 -Affiliate Member: \$180 -Individual Corporate Member: \$1,295 with 3 transferable individual membership (\$120 for additional) -Student Member: \$15  CEM application: -\$200 on site -\$300 at testing center (\$200 for renewal for 3 years)
<b>The American Society of Heating, Refrigeration and Air-Conditioning Engineers (ASHRAE)</b>	ASHRAE founded in 1984. It currently has over 50,000 volunteer members across 137 countries.	Currently, ASHRAE certification includes: -Healthcare Facility Design Professional Certification (HFDP) -High-Performance Building Design Professional Certification (HDBP) -Operations & Performance Management Professional Certification (OPMP) -Commissioning Process Management Professional Certification (CPMP)	-Career board -ASHRAE awards -International exposure with foreign associate societies -Access the most current information on HVAC& R technology -Local chapter involvement -Involvement in the development of standards for HVAC system design, practices and measurements	Membership (yearly): -Member: \$165, -Associate Member: \$165 -Affiliate Member: \$40 -Student Member: \$16  Certifications (yearly): -\$275 for members -\$395 for non-members

<p><b>University of Wisconsin-Madison</b></p>	<p>Five Day training course in addition to auxiliary technical training courses available. Certification exam available after the courses.</p>	<p>University of Wisconsin-Madison has several certifications available:</p> <ul style="list-style-type: none"> <li>- Qualified Commissioning Professional (QCxP)</li> <li>- CxAP<sup>SM</sup> – Accredited Commissioning Process Authority Professional (also CAP<sup>SM</sup>). Acknowledges applicants who have served as the primary commissioning authority during all project stages (pre-design through occupancy) on a minimum number and size of projects.</li> <li>- CXM<sup>SM</sup> – Accredited Commissioning Process Manager: Distinguishes applicants who have managed commissioning process activities within their organizations, such as university or government in-house programs.</li> <li>- CxTSM<sup>SM</sup> – Accredited Commissioning Process Technical Support Provider (also CTSM<sup>SM</sup>): Highlights the skill and experience of applicants who have provided commissioning services primarily in select project stages, on small or limited scope projects, or who provide key technical support to commissioning activities.</li> </ul>	<p>-Training -Certification</p>	<p>Certification fee: -Certification training \$675 -Certification \$75 -Renewal (every 5 years) \$75</p>
<p><b>The National Environmental Balancing Bureau (NEBB)</b></p>	<p>Text</p>	<p>-Text</p>	<p>-Text</p>	<p>-Text</p>

**Indirect Competitors**

Indirect Competitors of the BCA are organizations that are not directly engaged in the commissioning business. However, the benefits and/or services offered by the Indirect Competitor organizations are used in place of stand alone commissioning services. In order to overcome indirect competition, the BCA must not only promote the association over other trade associations, but also promote commissioning as an industry.

The National Environmental Balancing Bureau (NEBB) established in 1971 is the premier international certification for firms that conduct testing, adjusting and balancing (TAB) of building mechanical systems, which is a component of building commissioning.

The LEED Professional Accreditation program (LEED AP) is established by the U.S. Green Building Council (USGBC) to provide professionals with the knowledge and skills to lead and manage the LEED certification process. There are more than 43,000 professionals who have earned the certification since the program launched in 2001. Presently, the LEED is by far the most well known green certification program.

Refer to Appendix B for members, CCPs, and ACG CxAs by region.

## 5 Promotion of BCA Resources

One of the largest benefits of being a member of the Building Commissioning Association is that it is 100% focused on commissioning. Therefore, it seems logical that the BCA would be viewed as the authority on commissioning; particularly since the majority of members are providers who practice commissioning every day.

One particular way to highlight this fact and further market the association is through the promotion of the BCA written deliverables, or materials developed by BCA members. They include:

- Essential Attributes
- BCA Best Practices
- Building Commissioning Handbook, Second Edition
- BCA Process Templates
- Articles and Case Studies (to be developed)
- Archived BCA Webinars
- BCA Presentations

The association needs to introduce these materials to other organizations and associations through publications, trade shows, and presentations. The intent is for other groups to recognize, utilize, and publicize the value of these documents as key reference materials for all commissioning activities.

In addition to promoting these resources at national events attended by the BCA, it is critical for the regional chapters to support promotion these resources. This includes establishing a section for Resources on their websites that include or link to these materials. Also, chapters can promote and provide BCA materials at regional events. To further local support, regional events can be hosted which include the presentation of these materials both to members and non-members, to familiarize them with these resources.

THE BCA'S GOAL IS TO ACHIEVE HIGH PROFESSIONAL STANDARDS, WHILE ALLOWING FOR THE DIVERSE AND CREATIVE APPROACHES TO BUILDING COMMISSIONING THAT BENEFIT OUR PROFESSION AND ITS CLIENTS. FOR THIS REASON, THE BCA FOCUSES ON IDENTIFYING CRITICAL COMMISSIONING ATTRIBUTES AND ELEMENTS, RATHER THAN ATTEMPTING TO DICTATE A RIGID COMMISSIONING PROCESS.

*--from the BCA website*

New information needs to be developed as well, such as case studies, articles, and other data provided by our members documenting commissioning success, to both further the association and the performance of commissioning per the Essential Attributes/Best Practices. It is also a successful marketing tool to have each member use, promote, and reference these materials in their everyday performance of commissioning.

While promoting these documents, it important to stress the fact that these documents:

- 1 - Include the essential elements that must be present on every commissioning project, while
- 2 – Allowing the commissioning provider and project team to implement commissioning in a way that is appropriate to each project.

The lack of rigidity of the BCA materials was intended when they were created and is what makes them desirable to the entire industry.

## 6 Promotion of BCA Commissioning Provider Certification (CCP)

The Certified Commissioning Provider (CCP) exam was created to raise professional standards and provide a vehicle for certification in the building commissioning industry. To earn the CCP designation, participants must complete an application that is reviewed by the Building Commissioning Certification Board (BCCB) and pass a comprehensive two-hour examination.



Raising awareness of this certification has proven challenging for the association; due to both competition with other commissioning provider certifications and a lack of a clear or perceived need for certification in the industry as a whole. To gain traction, the CCP program needs to promote itself to Owners which will pull providers through the qualifications process.



Furthermore, based upon survey results of BCA members, the CCP program has stringent application requirements that turn away many interested applicants.

To address these concerns, the 2010 marketing strategies addressed in this Plan (particularly in the appendix) aim to expand advertising and other marketing efforts to promote the BCCB and the CCP program, in order to clarify market confusion and establish the value of the certification to the membership and the industry alike.

Two of the key features the CCP marketing strategies will promote are: 1) experience and inherent skill of the CCP provider and 2) risk associated with uncertified commissioning providers.

Note that with the recent offering of the exam on-line, the barriers of additional costs and time applicants put toward the exam have been eliminated.

With many of the strategies addressed in the Plan, the marketing campaign for the CCP is two-fold: nationally and regionally.

### Nationally

Educate owners about the high value of hiring a CCP certified provider

Place CCP ads in the industry trade publications

Openly differentiate CCP from other similar types of certifications

Develop and publish testimonial ads on other industry or certification websites for engineers or energy- efficiency professionals

Develop entry-level certification considering equivalency with other industry certifications from ACG, NEBB, ASHRAE, etc.

### Regionally

Utilize local chapters to launch grassroots marketing efforts through chapters' websites and local connections

Develop a mentoring system for BCA members who want to take the certification test (e.g. develop study groups at chapters)

Work with BCA corporate members to develop a career path that includes building the qualifications for their employees to become CCP candidates, like the AIA IDP program

## 7 Growth and Expansion of BCA Membership

Growth of the association is an on-going goal. For 2010, that figure is 20% growth over 2009 membership.

### Website

One way to benefit different member groups is to revise the BCA website to make information and materials available to market sector groups more readily. By creating an Owner's Section on the website specific information for needs such as finding a provider, establishing commissioning project guidelines, posting RFQ's and training sessions can be found more easily.

A specific section for Providers will also allow their needs to be met without searching for information. Advertising for employees, new templates and Best Practices, CCP exam information and other educational/training offerings can be easily found.

Additionally, creating a section for completed projects will accomplish three things. First, it will benefit those searching for information. Second, it will document the success of the commissioning process. Third, it will showcase the success of the BCA and its members.

## Regional Education and Presentations

Orienting BCA informational sessions into audience-focused presentations will provide more-specific benefits to each market sector. It also allows the association to visibly showcase expertise beyond general “What is Cx” and case study presentations. For 2010, each of the Association Chapters has agreed to conduct four training events on the following specific topics:

- The USGBC approved LEED-NC ½ day presentation
- AIA Related presentation on LEED with AIA CEU’s
- BCA Best Practices in Existing Building Commissioning
- Owner’s Project Requirements and Basis of Design

Three of the above-listed presentations are currently available through the Association, but require some updating. The BCA will need to implement a Train-the-Trainer approach for the USGBC-approved course. The Central Chapter will update the AIA presentation and submit to BCA Staff for registration with AIA. The NERC Chapter will make the EBCx presentation available. Chapter leaders will work with the Professional Development Committee to develop the OPR and BoD presentation.

## Member Satisfaction

The BCA will deploy bi-annual online surveys through Zoomerang to gather satisfaction levels, feedback, suggestions, and ideas from members during the membership renewal period. The results will assist the BCA to improve relationships and communications between chapters, committees, and members.

## 8 Marketing at the Chapter Level

Marketing at the Chapter Level is an important way to establish key relationships with associations, potential members, and users of commissioning. The ability of the chapters to support local activities is the responsibility of both the chapter leadership and the national association. The support of the chapters for the association and the association by the chapters is a reciprocal relationship. But by promoting the association’s deliverables, events, certification, etc. it ultimately makes membership in the BCA and its chapters more desirable.

**The BCA provides the deliverables, but the chapters must develop the relationships.**

Also, building relationships with local entities, such as other organizations and student groups will help to grow and expand the chapters’ number of participants and overall standing in each area. Relationship-building is the key to strengthening chapters.

Relationship-building is the key to strengthening chapters.

Having chapter leadership and other members call on colleagues and relationships to:

- participate in co-hosted events, such as meetings and webinars
- sponsor BCA activities
- offer to sponsor other organization’s activities
- offer to provide articles another Cx information in outside trade publications
- present case studies as a project team
- utilize and recommend BCA materials in conjunction with their own materials

While many of the activities above are standard to an organization, personally reaching out to outside entities to complete them jointly, or within their organization's offerings, is a critical way to broaden and expand.

Lastly, each chapter must be encouraged and supported in their marketing efforts. The Marketing and Outreach Committee will provide a list of marketing templates to facilitate branding and communication. It then becomes critical for each Chapter to develop and maintain their regional materials, including:

- up-to-date website, including calendar of events, BCA documents, local member list and officers
- pamphlets about the chapter and membership
- supporting marketing materials regarding commissioning in their region (state standards, local standards etc.)
- e-mailed Newsflash of some type, with up-to-date information
- printed or electronic fliers advertising chapter events well in advance

**BECAUSE THE BCA'S MEMBERSHIP IS MADE UP OF INDIVIDUALS WHO PERFORM OR PARTICIPATE IN COMMISSIONING, IT IS CRITICAL THAT MEMBERS CONTRIBUTE TO ALL ASPECTS OF THE ASSOCIATION.**

## 9 Increase Volunteerism

Increasing volunteerism is a key to growing the organization as a whole. This is largely due to the fact that the Association is a non-profit and volunteers are critical to getting tasks accomplished with no overhead.

However, having a strong response from the membership as volunteers also establishes and further promotes commissioning as a critical part of the industry as a whole.

Because the BCA's membership is made up of individuals who perform or participate in commissioning, it is critical that those individuals contribute to all aspects of the association.

The most obvious way to encourage volunteerism is to both ask for it and reward it. The following are suggested tasks and incentives to assist the association:

- Create a Writer's Bureau that provides a author recognition.
- Create a Speaker's Bureau that provides speaker recognition.
- Recognize names of Committee and Chapter members. Each month do member focuses in the Newsflash – one for committee and one for chapter. Introduce the leaders in our organization to each other and to the membership.
- Identify one member per Chapter to participate on the Marketing and Outreach Committee
- Recognize volunteers publicly
- Consider linking volunteer participation and membership in some form or fashion

## 10 Furthering Relationships in Other Market Sectors

### MARKET SEGMENTATION

The following represents the market sectors served by the Building Commissioning Association:

- **Building owners and facility managers** –Comprised of government agencies at federal/state/local levels, institutions, educational facilities, healthcare, commercial property groups, retailers, utilities, etc. Includes all Owner stakeholders ranging from financiers to operational staff. International representation.
- **Commissioning providers** – Firms and individuals offering commissioning services on New Construction, Existing Building, or process commissioning. International representation. This is the secondary market segment of focus for the BCA at this time.
- **Students who are studying mechanical, HVAC and building energy efficiency** – A new market segment that BCA would like to include in outreach efforts in the future. Comprised of students at the post-secondary education level in either baccalaureate or technical programs. Market segment of focus for the BCA either in 2011 or further in the future.
- **Architects and MEP Engineers** – Key participants in the commissioning process. Comprised of Architects and MEP Engineers not engaged in the commissioning industry as providers. Their involvement would be an understanding of how commissioning impacts their “business as usual.” An educational outreach opportunity for the BCA.
- **Contractors** – Essential participants in the commissioning process. Comprised of Contractors not engaged in the commissioning industry as providers. Their involvement would be an understanding of how commissioning impacts their “business as usual.” An educational outreach opportunity for the BCA.
- **Equipment manufacturers** – Participants in the commissioning process from a strategic perspective. Collaboration with the equipment manufacturer’s on topics such as commissionability of equipment, owner training best practices, coordination of activities, installation means and methods, availability and usability of documentation, etc. are of interest to the commissioning industry as a whole. An educational outreach opportunity for the BCA.
- **Training institutions** (university, college and vocational school instructors) – Tying in with BCA’s future plans to reach the Student Population; this segment includes educators at various teaching institutes. Efforts here would be to facilitate knowledge transfer by educating the instructors in commissioning practices and supporting their requests for information and continuing education. Market segment of focus for the BCA either in 2011 or further in the future.
- **Utilities and Consortiums** – Utilities may include commissioning as a required activity for incentive programs. They can become a resource requiring certification and even offer venues for training and presentations to their customer groups.



A major marketing objective is to establish an ongoing collaborative relationship with related organizations within the building industry. This has been an on-going task of the BCA; however, it is important that this be done on the regional/local level as well as nationally. Specific opportunities to utilize those relationships include:

- ◆ Regional conferences and speaking opportunities attended by the chapter representatives to strengthen national relationships, and help grow the chapter.
- ◆ Case studies presented and published in other organization's forums as well as our own. Both local and national exposure can be reported on the BCA website and in the *Checklist*.
- ◆ Utilize the *Checklist* as a tool to reach and educate the industry as a whole by noting outside organization's activities, as well as provide pertinent information to those organizations.
- ◆ As the budget allows, advertise in outside trade magazines and sponsor outside organization's activities to strengthen relationships and for exposure

## 11 Marketing Tactic Effectiveness

Public awareness and membership revenues, that are generated and driven by each marketing channel, will measure marketing tactic effectiveness.

- **Tradeshow Effectiveness** = 1 New Member per every 50 Conference attendees.
- **Print Deliverables** = 25 Affirmative Calls to Action per 250 delivered print pieces.
- **Press Releases** = 2% inquiry on BCA due to content in release.
- **Online Registration** = 33 Affirmative Calls to Action per 100 delivered electronic transmissions.
- **e-Marketing** = 25% Click Through Ratio for 50% of Newsflash and Checklist Content. (FYI Requires restructuring current format to display only abstracts with content on landing pages.)
- **Podcast or Social Media** = 2010 Success rate is establishing avenues and gaining a following. 2011 success rate will be 25% growth and active participation/contribution from 15% of membership.
- **Print Ads and Editorial Ads** = 10 Affirmative Calls to Action per every \$1000 spent. Additionally, measurable increases in public BCA survey conducted at the end of each year. In 2010, we'll establish base line for 10% improvement in subsequent surveys.

## 12 Marketing Budget for 2010

The 2010 marketing budget is currently in development and approval. At the time of this Draft, the Marketing and Outreach Committee assumed no increase over the 2009 budget of \$20,000. As such, marketing tactics identified in the plan and in Appendix D are annotated as either a high priority or low priority depending upon availability of resources. The projected budget does not include the BCA staff labor hours needed to implement the associated marketing deliverables.

One budgetary goal of 2010 is to identify pre-budget contract decisions required for 2011. One example of these items include tradeshow deposits which are often required  $\frac{1}{2}$  - 1 year in advance of the event. The purpose of identifying and planning for these events within the 2010 budget is to allow for proper cash flow management and decision-making or authorization by the Board of Directors.

**-END-**



# 2010 MARKETING PLAN



*Appendix A:*

*Marketing Task Matrix*

**APPENDIX A:**

**MARKETING TASK MATRIX**

<b>Marketing Objective 1: Facilitate member benefits that increase membership, certification, and association activism</b>			
<b>Strategy 1: Develop and communicate benefits attractive to Owners</b>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Communicate offer of Project Postings to Owner’s for free. Prepare a list of universities, hospitals, K-12, commercial building owners, etc. Send information along with a sample RFP from BCA’s templates as well as a list of additional benefits.	Marketing & Outreach	A
<b>Tactic #2</b>	Revise the BCA webpage to add a page exclusively for Owners. On it, have Owner-focused “Calls to Action” such as: Post an RFP, Get a Referral, Find a Provider, Request Training Session, Find Commissioning Information, etc.	PECI staff - Marketing Services Marketing & Outreach	B
<b>Tactic #3</b>	Present Owner-oriented presentation in each region. Use membership list plus local Owners as attendee list. The topics will be: 1) Owner’s Project Requirements and Basis of Design information and 2) Existing Building Commissioning Best Practices.	PECI staff - Marketing Services Marketing & Outreach Member Services Chapters	A
<b>Strategy 2: Develop and communicate benefits attractive to Providers</b>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Communicate offer of Process Templates and Webinars to providers. Prepare a list of provider firms. Send information along with a sample Cx Plan or Functional Test from BCA’s templates as well as a list of additional benefits.	Marketing & Outreach Member Services	A
<b>Tactic #2</b>	Revamp the BCA webpage to add a page exclusively for Providers. On it, have Provider focused “Calls to Action” such as: Post or Find a Job, Find a Project, Request Training Session, Find Commissioning Information, etc.	PECI staff - Marketing Services Marketing & Outreach	B
<b>Tactic #3</b>	Present Provider-oriented presentation in each region. Use membership list plus local providers and design professionals as attendee list. Topics will be the: 1) Owner’s Project Requirements and Basis of Design and 2) Existing Building Commissioning Best Practices.	PECI staff - Marketing Services Marketing & Outreach Chapters	A
<b>Strategy 3: Encourage volunteerism at Committee and Chapter level.</b>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Create an active and usable writer’s bureau.	Marketing & Outreach	A
<b>Tactic #2</b>	Create an active and usable speaker’s bureau.	Marketing & Outreach	A
<b>Tactic #3</b>	Recognize names of Committee and Chapter members. Each Newsflash, do member focuses – one for committee and one for chapter. Introduce the leaders in our organization to each other and to the membership.	PECI staff - Marketing Services Marketing & Outreach	B

		Chapters	
<b>Tactic #4</b>	Chapters to identify one member to participate on the committees.	PECI staff - Marketing Services Marketing & Outreach Chapters	A
<b>Tactic #5</b>	Marketing and Outreach Committee to provide marketing templates and resources for the Chapter use.	PECI staff - Marketing Services Marketing & Outreach Chapters	A
<b>Strategy 4:</b> <i>Develop BCA Value Propositions.</i>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Create BCA value propositions for: users, providers, and utilities.	Marketing & Outreach	A
<b>Tactic #2</b>	Update BCA website, Checklist, Newsflash, and committee and chapter resources with the value propositions.	Marketing & Outreach	A
<b>Marketing Objective 2: Develop and maintain the best practices on the commissioning process</b>			
<b>Strategy 1:</b> <i>Promote and increase the awareness of the BCA Best Practices at all levels of participants</i>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Maintain diverse webinar content addressing issues and topics for providers and users of commissioning.	Professional Dev. & Ed	A
<b>Tactic #2</b>	Revise the BCA resource webpage to include more industry resources.	PECI staff - Marketing Services Marketing & Outreach	C
<b>Tactic #3</b>	Assist chapters redesigning their chapter websites to become a promotional tools for BCA	PECI staff - Marketing Services Marketing & Outreach Chapters	C
<b>Tactic #4</b>	Conduct one event on the Building Commissioning Best Practices in each region. Topic will be Existing Building Commissioning Best Practices.	PECI staff - Marketing Services Marketing & Outreach Chapters	B
<b>Tactic #5</b>	Present BCA Best Practices message at national events. Those targeted = AIA and Greenbuild for 2010.	PECI staff - Marketing Services Marketing & Outreach Professional Dev. & Ed	A
<b>Strategy 2:</b> <i>Continue to conduct research in order to develop the content for the next edition of Best Practices in new and existing buildings</i>		<b>Responsible Entity</b>	<b>Priority</b>

<b>Tactic #1</b>	Support Standards committee in promoting the Commissioning for New Construction Best Practices via three 2011 abstract submissions.	Marketing & Outreach Standards	A
<b>Tactic #2</b>	Prepare website update and e-mail mailer for the Existing Building Commissioning Guide package.	Marketing & Outreach Standards	A
<b>Tactic #3</b>		PECI staff	C
<b>Strategy 3:</b> Encourage members to share their knowledge and practices using both inward and outward facing media venues		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Maintain and Expand BCA's social media presence to facilitate knowledge transfer, drive the traffic to the BCA website, promote events, poll membership, etc.	Marketing & Outreach	B
<b>Tactic #2</b>	Post education events, such as webinars, on iTunes and other mediums.	Marketing & Outreach Professional Dev. & Ed	B
<b>Tactic #3</b>	See Marketing Objective 5.2.1.	Marketing & Outreach	
<b>Marketing Objective 3:</b> Assure continuing professional education that meets the BCA's best practices			
<b>Strategy 1:</b> Utilize various media channels to conduct training courses		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	See Marketing Objective 2.1.1	Professional Dev. & Ed	
<b>Tactic #2</b>	Create quarterly Podcasts (15 mins. max) on variety of smaller topics on building commissioning and publish them on BCA website and iTunes	Marketing & Outreach Professional Dev. & Ed	C
<b>Tactic #3</b>	Offer on-site commissioning training programs to organizations, associations, Owners, etc. on a topic of their choosing.	Marketing & Outreach Professional Dev. & Ed	A
<b>Strategy 2:</b> Work with PECl to create next generation training curriculum		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Identify curriculum topics and trainers to teach the courses	Professional Dev. & Ed	A
<b>Marketing Objective 4:</b> Market the Certified Commissioning Professional (CCP) to be the most recognizable credential for commissioning professionals			
<b>Strategy 1:</b> Develop a marketing campaign to promote CCP within the BCA chapters		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Utilize local chapters to launch grassroots marketing efforts through chapters' websites and local connections.	Marketing & Outreach Chapters	A
<b>Tactic #2</b>	Develop a mentoring system for BCA members who want to take the certification test (ex. Develop study groups at chapters)	Certification Chapters	C
<b>Tactic #3</b>	Work with BCA corporate members to develop a career path that includes building the qualifications for their employees to become CCP candidates	Certification	C
<b>Strategy 2:</b> Develop a marketing campaign to promote CCP externally		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Share message to owners about the high return values of hiring a CCP certified provider.	Marketing & Outreach	A
<b>Tactic #2</b>	Develop a CCP brochure for use at tradeshow and events.	Marketing & Outreach	C

<b>Tactic #3</b>	Differentiate and publicize CCP from other similar types of certifications.	Marketing & Outreach	A
<b>Tactic #4</b>	Testimonial ads on other industry or certification websites for engineers or energy efficiency professionals, as budget allows.	Marketing & Outreach	C
<b>Marketing Objective 5:</b> Establish an ongoing collaborative relationship with related organizations within the building industry			
<b>Strategy 1:</b> <i>Identify target organizations to collaborate</i>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Sponsor two chapter events regionally: USGBC event and AIA event.	Marketing & Outreach Chapters	A
<b>Tactic #2</b>	Research event speaking opportunities at local industry conferences and follow through on presentations.	Marketing & Outreach Chapters	B
<b>Strategy 2:</b> <i>Share case studies with other publications and organizations</i>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	Work with other organization's publications to publish commissioning articles written by BCA members.	Marketing & Outreach	C
<b>Tactic #2</b>	Create RSS feed for the <i>Checklist</i> to generate awareness to other publications	Marketing & Outreach	B
<b>Tactic #3</b>	Revamp the editorial content of the <i>Checklist</i> as a better resource for the members, chapters and the commissioning industry	PECI staff - Marketing Services Marketing & Outreach	A
<b>Strategy 3:</b> <i>Advertise, sponsor and exhibit at trade publications, events and trade shows</i>		<b>Responsible Entity</b>	<b>Priority</b>
<b>Tactic #1</b>	See Tactics from Marketing Objective 2.		



# 2010 MARKETING PLAN



**Appendix B:** *Geographic Data for BCA Members, Certified Commissioning Professionals and ACG Certified Commissioning Authorities*

## APPENDIX B:

### GEOGRAPHIC DATA FOR BCA MEMBERS, CERTIFIED COMMISSIONING PROFESSIONALS (CCP) AND ACG CERTIFIED COMMISSIONING AUTHORITIES (CXA)

The spread of the BCA members in the United States seems to be evenly distributed throughout the six regions of the United States with stronger membership presence in the Southwest, Northeast and Southeast where the demand for building commissioning providers has increased in recent years (See Fig. 1).

BCA Members by region:		
<i>International</i>		41
Northwest	(AK,WA,OR,ID,MT,WY,HI)	110
Northeast	(ME,NH,VT,NY,MA,CT,RI,NJ)	143
Central	(ND,SD,MN,WI,MI,IL,IN,NE,OH,KS,MO,IA)	138
Southeast	(LA,AR,MS,AL,GA,FL,SC,NC,TN,KY)	143
Southwest	(TX,OK,NM,AZ,CA,NV,CO,UT)	173
Mid-Atlantic	(DC,MD,VA,WV,PA,DE)	121

Figure 1: Information gathered from the 2007 BCA membership list

The CCP record shows that the number of the CCP certified providers has a strong correlation with the number of members in those three regions (See Fig. 2).

CCP by region:		
<i>International</i>		0
Northwest	(AK,WA,OR,ID,MT,WY,HI)	9
Northeast	(ME,NH,VT,NY,MA,CT,RI,NJ)	16
Central	(ND,SD,MN,WI,MI,IL,IN,NE,OH,KS,MO,IA)	11
Southeast	(LA,AR,MS,AL,GA,FL,SC,NC,TN,KY)	16
Southwest	(TX,OK,NM,AZ,CA,NV,CO,UT)	10
Mid-Atlantic	(DC,MD,VA,WV,PA,DE)	16

Figure 2: Information gathered from the 2007 CCP List

The CCP's toughest competition, the AABC Commissioning Group (ACG), has most of its Certified Commissioning Authority (CxA) providers in the Central, Southeast and Southwest regions, which indicates that the ACG possibly have a large membership in those three regions (See Fig. 3).

<b>CxA by region: (update stats will be provided by Sheri)</b>		
<i>International</i>		7
Northwest	(AK,WA,OR,ID,MT,WY,HI)	8
Northeast	(ME,NH,VT,NY,MA,CT,RI,NJ)	4
Central	(ND,SD,MN,WI,MI,IL,IN,NE,OH,KS,MO,IA)	28
Southeast	(LA,AR,MS,AL,GA,FL,SC,NC,TN,KY)	43
Southwest	(TX,OK,NM,AZ,CA,NV,CO,UT)	47
Mid-Atlantic	(DC,MD,VA,WV,PA,DE)	30

Figure 3: Information gathered by the BCA staff from <http://www.commissioning.org/membershipdirectory/default.aspx> on March, 2007.



# 2010 MARKETING PLAN



*Appendix C:*

*Key Marketing Messages by Segment*

**APPENDIX C:**  
KEY MARKETING MESSAGES BY SEGMENT

Key Marketing Messages by Segment				
Target Market	Problem Statement	BCA's Solution	Results	Competitive Difference
<b>Owners</b>	Knowing your building will satisfy your requirements and address risk and cost considerations	<ul style="list-style-type: none"> <li>▪ Commissioning best practices</li> <li>▪ Nationally recognized, leading commissioning association dedicated exclusively to the commissioning industry</li> <li>▪ Networking and relationship building opportunities with other owners and providers</li> <li>▪ Standard process templates created for a variety of owner tasks</li> <li>▪ RFP/RFQ opportunities posted by Owners</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sponsorship and Collaboration with the following leading organizations and owner groups: USGBC, AIA, ASHRAE, IFMA, PEI, NWEAA, GSA, etc.</li> <li>▪ Attributes-driven Best Practices for New Construction and Existing Buildings.</li> <li>▪ National partnerships formed with like-minded Owners through committee, chapter, event, and social networking opportunities</li> <li>▪ Average of 2 "Waves" per year released of various commissioning templates and documents covering: functional tests, planning, procuring, operations and maintenance, existing buildings, etc.</li> <li>▪ Average of 10 RFQ/RFP's posted per month – a service free to Owners and reaching the entire BCA membership roster.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The BCA Attributes, philosophy, and mission recognize the Owner's ability to receive the best building's possible. To realize cost savings. To operate functional facilities. To contribute to sustainable building operations. The BCA is the only commissioning association dedicated to commissioning and developing providers and users of commissioning alike.</li> <li>▪ The BCA's Best Practices for New Construction and Existing Buildings attribute driven nature ensures quality without <u>prescribing</u> a commissioning process. This gives Owners the most flexibility possible without sacrificing process outcomes. Commissioning can be tailored to your specific building needs.</li> <li>▪ BCA Members aren't just providers – they are interested parties including: Owners, Associations, Advocacy Groups, Facility Managers, among others. This dynamic membership opens opportunities beyond the traditional association.</li> <li>▪ The BCA is the only industry association providing fresh templates, used by real owners to help you get started, create an RFP, verify the work of your commissioning provider, train your Operations and Maintenance staff, or even develop an internal commissioning program.</li> <li>▪ Owners can share upcoming projects with the most qualified commissioning providers and firms</li> </ul>

<b>Owners</b>	Finding the best people to perform commissioning on your building	<ul style="list-style-type: none"> <li>▪ Highest caliber certification to demonstrate your qualifications</li> <li>▪ Advanced technical education available through webinars, events, and presentations</li> <li>▪ Networking and relationship building opportunities with other owners and providers</li> </ul>	<ul style="list-style-type: none"> <li>▪ 83 CCP's in the nation, representing the highest experience, education, and capability of all providers in the US. CCP recognized by Owner organizations such as: GSA, BOMA, IFMA, ASHEE, state government, universities, and healthcare facilities</li> <li>▪ Average of 6 Advanced Technical learning programs per year</li> <li>▪ Basics of commissioning process week-long training session</li> <li>▪ Networking with over 869 National and International members</li> </ul>	<p>in the industry through BCA's free project posting available on the website. Information is sent to membership as a separate e-mail transmission.</p> <ul style="list-style-type: none"> <li>▪ CCP's receive certification after demonstrating experience and education, receiving referrals from clients, and passing an exam. CCP's are the MOST qualified providers in the industry – a benefit that communicates volumes to their ability to perform high quality commissioning and provide you with measurable results.</li> <li>▪ Benefit from the broad range of BCA's commissioning-related education topics. Webinar and conference learning opportunities offer members flexibility in continuing education programs. Topics range from existing building commissioning technologies to improving contract language allowing you to pick the topics that suit your needs.</li> <li>▪ Providing comprehensive training for you and your staff that covers everything from OPR to On-going Commissioning requirements. Taught by the founder of the commissioning industry in a small classroom environment with both lecture and experiential delivery. This gives attendees a common platform or standard of care for commissioning. That means you have peace of mind when selecting a BCA provider or implementing an internal process.</li> <li>▪ BCA's Membership database is full of providers, Owners, and association partners – all a contact away if you need a provider, are looking for a best practice, need a referral, or simply have a question.</li> </ul>
		<ul style="list-style-type: none"> <li>▪ Networking and relationship building opportunities with team partners, specialists and owners</li> </ul>	<ul style="list-style-type: none"> <li>▪ National partnerships formed with like-minded commissioning providers</li> <li>▪ National database of commissioning</li> </ul>	<ul style="list-style-type: none"> <li>▪ All BCA Members subscribe to a list of Attributes. That, plus the membership's activism, fosters camaraderie among members translating into partnerships and projects.</li> </ul>

<b>Providers</b>	Identifying and landing new commissioning projects for you and your company	<ul style="list-style-type: none"> <li>▪ RFP/RFQ opportunities posted by Owners</li> <li>▪ Highest caliber certification to demonstrate your qualifications</li> </ul>	<p>specialists</p> <ul style="list-style-type: none"> <li>▪ 83 CCP's in the nation, representing the highest experience, education, and capability of all providers in the US. CCP recognized by Owner organizations such as: GSA, BOMA, IFMA, ASHEE, state government, universities, and healthcare facilities</li> <li>▪ Regular RFQ / RFP posting by Owners interested in BCA firms.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Owners interested in the caliber of commissioning services the BCA Providers often post their projects on BCA's website.</li> <li>▪ CCP's receive certification after demonstrating experience and education, receiving referrals from clients, and passing an exam. CCP's are the MOST qualified providers in the industry – a benefit that communicates volumes to clients and partners.</li> </ul>
	Advancing your career and capabilities. Developing new and existing staff.	<ul style="list-style-type: none"> <li>▪ Advanced technical education available through webinars, events, and presentations</li> <li>▪ Nationwide recognized commissioning certification</li> <li>▪ Volunteer opportunities at National and Regional levels</li> <li>▪ Nationally recognized, leading commissioning association dedicated exclusively to the commissioning industry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Average of 6 Advanced Technical learning programs per year</li> <li>▪ Basics of commissioning process week-long training session led by commissioning industry founders.</li> <li>▪ 83 CCP's in the nation, representing the highest experience, education, and capability of all providers in the US. CCP recognized by Owner organizations such as: GSA, BOMA, IFMA, ASHEE, state government, universities, and healthcare facilities</li> <li>▪ 7 National Committees, 6 Regional Chapters</li> <li>▪ Regular opportunities to place articles in national publications and conduct speaking engagements to national audiences</li> <li>▪ Networking with over 869 National and International members</li> <li>▪ Job board postings available on the BCA website, social networks, and regular membership communications</li> <li>▪ Sponsored and Collaborations with the following leading organizations and owner groups: USGBC, AIA, ASHRAE, IFMA, PECE, NWEAA, GSA, etc.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Webinar and conference learning opportunities offer you flexibility in your firm's continuing education programs. Topics range from existing building commissioning technologies to improving contract language allowing you to pick the topics that suit your needs.</li> <li>▪ Providing comprehensive training for you and your staff that covers everything from OPR to On-going Commissioning requirements. Taught by the founder of the commissioning industry in a small classroom environment with both lecture and experiential delivery.</li> <li>▪ CCP's receive certification after demonstrating experience and education, receiving referrals from clients, and passing an exam. CCP's are the MOST qualified providers in the industry – a benefit that communicates volumes to clients and partners.</li> <li>▪ Recruit and receive referrals from the most experienced providers in the nation with the BCA's Job Posting Board and social networking groups.</li> <li>▪ Only commissioning association actively engaging trade associations and Owners at a national level allowing you the opportunity to represent the leading commissioning industry in the nation</li> </ul>

<p><b>Providers</b></p>	<p>Delivering projects profitably</p>	<ul style="list-style-type: none"> <li>▪ Standard process templates created for a variety of commissioning tasks</li> <li>▪ Commissioning best practices</li> </ul>	<ul style="list-style-type: none"> <li>▪ Average of 2 “Waves” per year released of various commissioning templates and documents covering: functional tests, planning, procuring, operations and maintenance, existing buildings, etc.</li> <li>▪ Best Practices for New Construction and Existing Buildings formulated to be attribute driven.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The BCA is the only industry association providing fresh templates, used by real providers to help you get started or improve your process.</li> <li>▪ The BCA’s Best Practices for New Construction and Existing Buildings attribute driven nature ensures quality without <u>prescribing</u> a commissioning process. This gives you and your Owner the most flexibility possible without sacrificing process outcomes.</li> </ul>
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*Appendix D:*

*Marketing Timeline*

**APPENDIX D:**  
MARKETING TIMELINE

BCA 2010 Marketing Event and Material Schedule												
Category	January	February	March	April	May	June	July	August	September	October	November	December
<b>MAILINGS ■</b>												
Owners – Project Postings – MO 1.1.1												
Providers – Templates – MO 1.2.1												
Volunteer Recognitions – MO 1.3.3												
Checklist Rework – MO 5.2.3												
<b>ONLINE PRESENCE ■</b>												
BCA Website Rework												
◆ Owner’s Page – MO 1.1.2												
◆ Provider’s Page – MO 1.2.2												
◆ Resource Page – MO 2.1.2												
EBCx Database Published – MO 2.2.3												
Case Study Published – MO 2.2.2												
Social Media – MO 2.3.1												
◆ LinkedIn Group												
◆ Facebook												
◆ Twitter												
◆ iTunes / Youtube												
Podcasts – MO 3.1.2												
Add RSS feed to BCA website – MO 5.2.2												
<b>CONFERENCES / EVENTS ■</b>												
Regional Events												
◆ OPR/BOD			SE	SW	MA	NE	NW	CC	CAN			
◆ Provider / Best Practices			SW	MA	NE	NW	CC	CAN	SE			
◆ Other Topics			MA	NE	NW	CC	CAN	SE	SW			

National Events – MO 2.1.4													
◆ AIA		Preso.			Conf.								
◆ Greenbuild	Abstract											Conf.	
◆ IFMA	Abstract										Conf.		
◆ AHR													
◆ GovEnergy													
As Requested Owner Presentations – MO 3.1.3													
Local Speaking about BCA – MO 5.1.2													
Speaker’s Bureau – MO 1.3.2													
<b>PUBLICATIONS ■</b>													
Writer’s Bureau – MO 1.3.1													
Articles – MO 5.2.1													
<b>EDUCATION/TRAINING/CERTIFICATION ■</b>													
Webinars - M.O. 2.1.1	Schedule												
Curriculum with PECl – MO 3.2.1	Schedule												
Mentoring - MO 4.1.2													
Career Path – MO 4.1.3													
CCP Marketing Campaign													
◆ CCP Messaging – MO 4.2.1													
◆ Differentiation – MO 4.2.3													
◆ Ads Assessment – MO 4.2.2 and 4.2.4													
<b>ADVERTISING ■</b>													
CCP to Industry – M.O. 4.2.2	TBD												
CCP to Associations – M.O. 4.2.4	TBD												
<b>ON-LINE SURVEYS ■</b>													
Member satisfaction.													



*Appendix E:*

*BCA Survey Results*

# Building Commissioning Association

Leadership Survey  
January 25-28, 2010



# Survey Overview

This survey was commissioned by the BCA with Smart Survey™ providers, i-OP, in order to understand the critical issues for the Board and leadership before their meeting in early February.

The survey ran from January 25th to 28th, 2010, with the goals of:

- Measuring the leadership's overall perception of value
- Gauge the relative importance of different areas of BCA's offerings to its members
- Identifying areas for individual stakeholder involvement.

# Survey Responses Showed a Desire to Invest in the BCA's Future

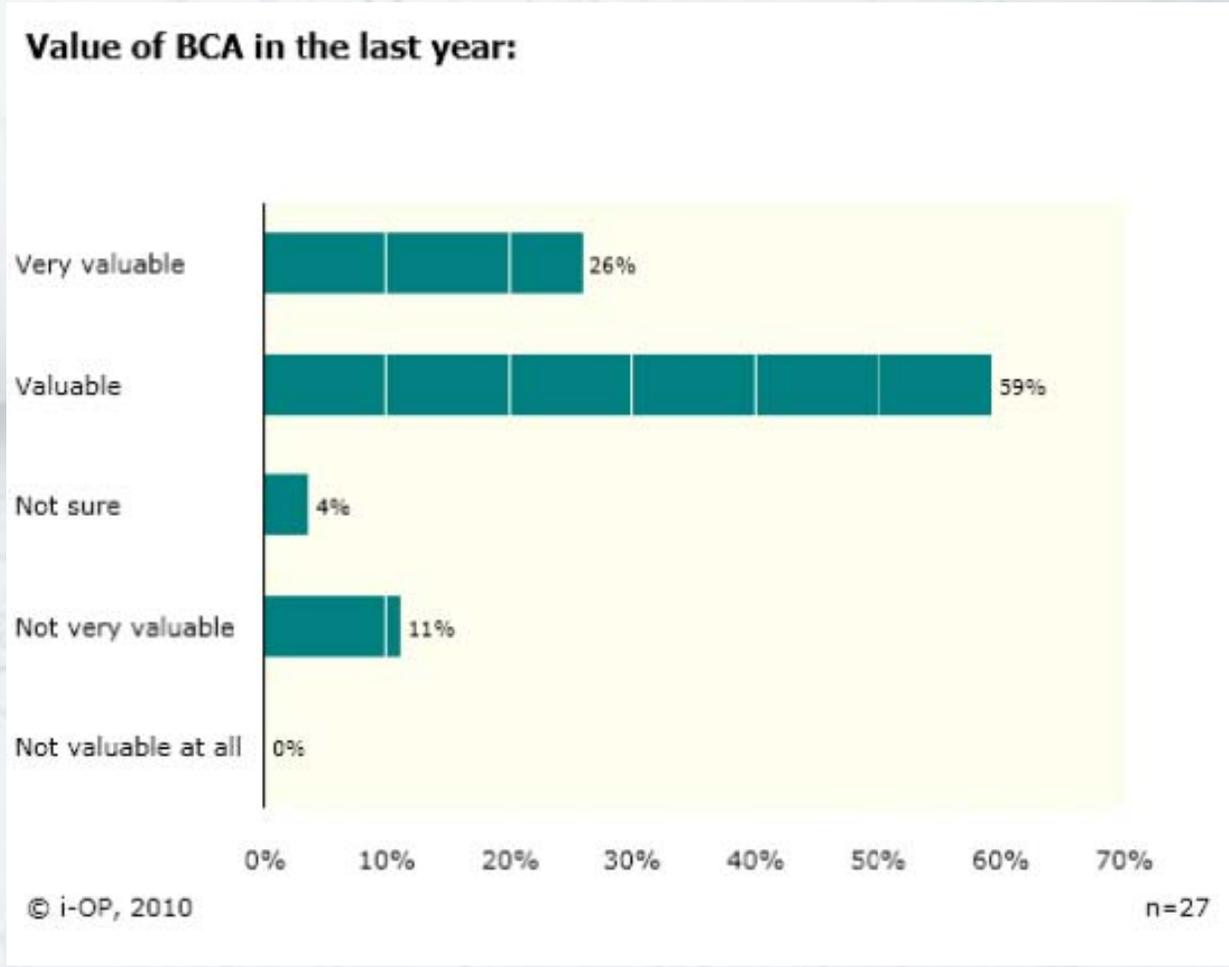
- 66% of BCA leadership finished the survey
- The average time to complete the dialog was 26.9 minutes
- 85% said they liked giving feedback through this survey



# Key Findings

- The BCA enjoys the support of its leadership, who finds it to be very valuable to the industry, their companies and their personal development.
- There is a need to move past the discussion of the mission statement and move on to the action items that support the BCA's Mission.
- There is a need to improve the value of Certification, Chapter Involvement, Committee Involvement and Templates.
- There is a desire to build membership off the successes of Education, Best Practices (especially the Essential Attributes) and Industry Promotion.

# 85% find BCA Valuable/Very Valuable



## Peer Relationships, Education and Business Benefits are Value Drivers (20 Responses)

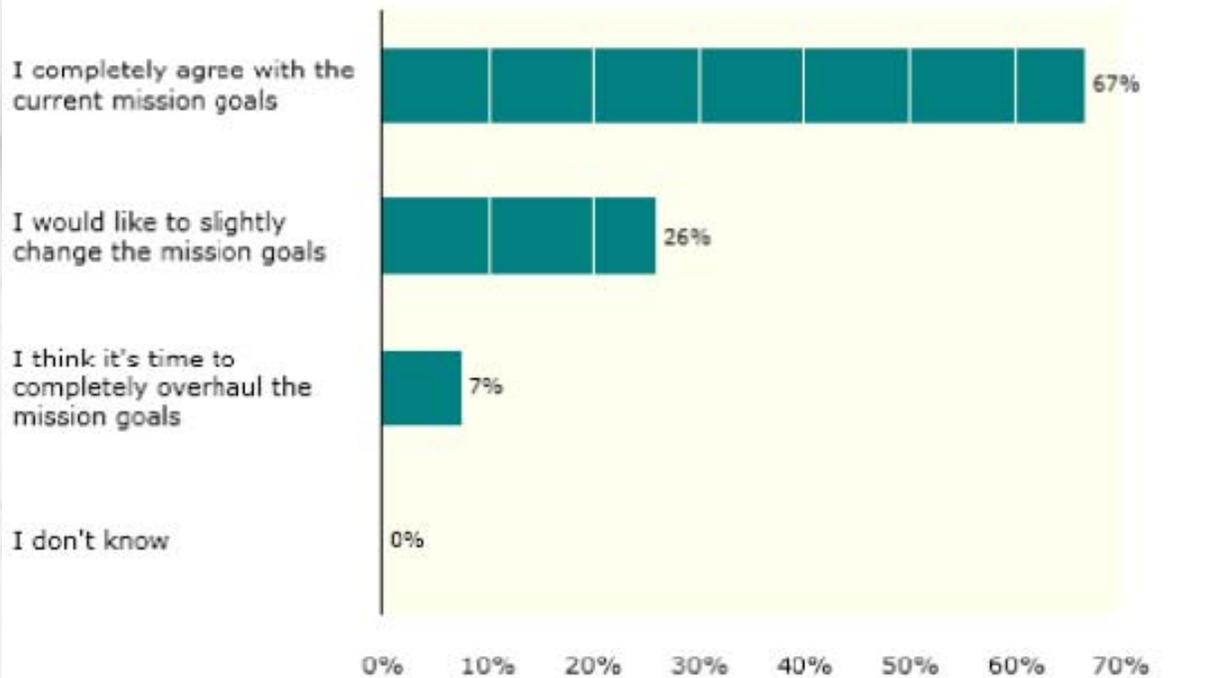
- “Developing relationships with others in the industry with whom I do not compete provides me with a valuable tool to learn how others see the industry.”
- “....I've been able to use ideas and information learned through being on the BCA BOD to better my practice...and make our firm better....I've had an incredible amount of fun and found the work and effort put into the BCA very rewarding.”
- “....Gives my company credibility with owners when pursuing commissioning work. Provides camaraderie & connections to other leaders in the commissioning industry.”

# Process, Participation and Communication Reasons for Low Value

- “The BCA has not provided me with any new material to help me commission my projects and/or interface better with my clients...I did not see anything noteworthy related to the BCA at the NCBC in Seattle last year. As for the Expo, I also did not see a report afterwards on how well it went. The Checklists are okay, but again, there is usually not anything "new". The BCA does not appear to be moving forward, it looks more like it is standing still.”

# Most Wouldn't Change the Mission Statement

**85% agree that the BCA mission statement covers the most important goals of our association, with only slight modifications.**



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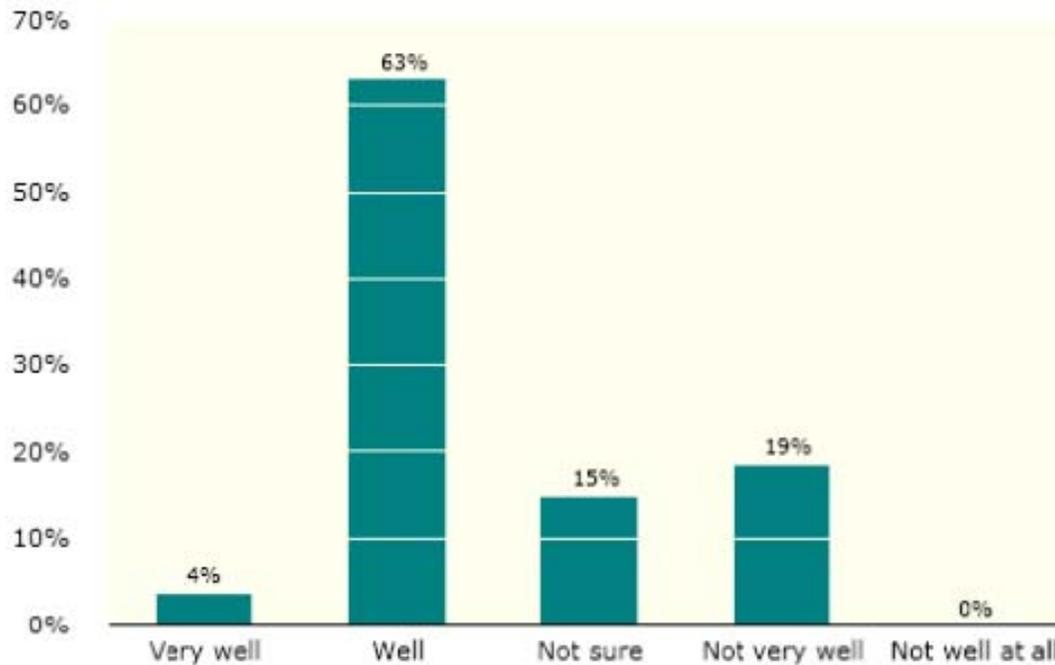
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## Ideas for Mission Statement Changes Focus on Role of the Organization (8 suggestions)

- Alter the part about promoting the benefits of the industry to more current focus. Perhaps should focus more on the education aspects and helping to create and maintain a quality industry for all. The original organization was focused more on providers while current membership desires to focus on all Cx participants (owners, contractors, etc.). This may be like shifting from a 501C(6) to a 501C(3) that assists all rather than just those that benefit from the industry.
- It's not so much that I think BCA needs to overhaul the mission statement as it is that I wish it were something different, more like the original mission. BCA was originally founded to *'promote building commissioning practices that maintain high professional standards, and fulfill building owners' expectations.'* ...I'd like us to be showing others how to use solid fundamentals to think outside the box, rather than helping to create the box."
- "The mission statement starts with *'Guiding the building commissioning industry.....'* In my opinion, the BCA should be guiding more than just the commissioning industry, it should be guiding the building industry. "

# How well are we as an organization living up to this mission?

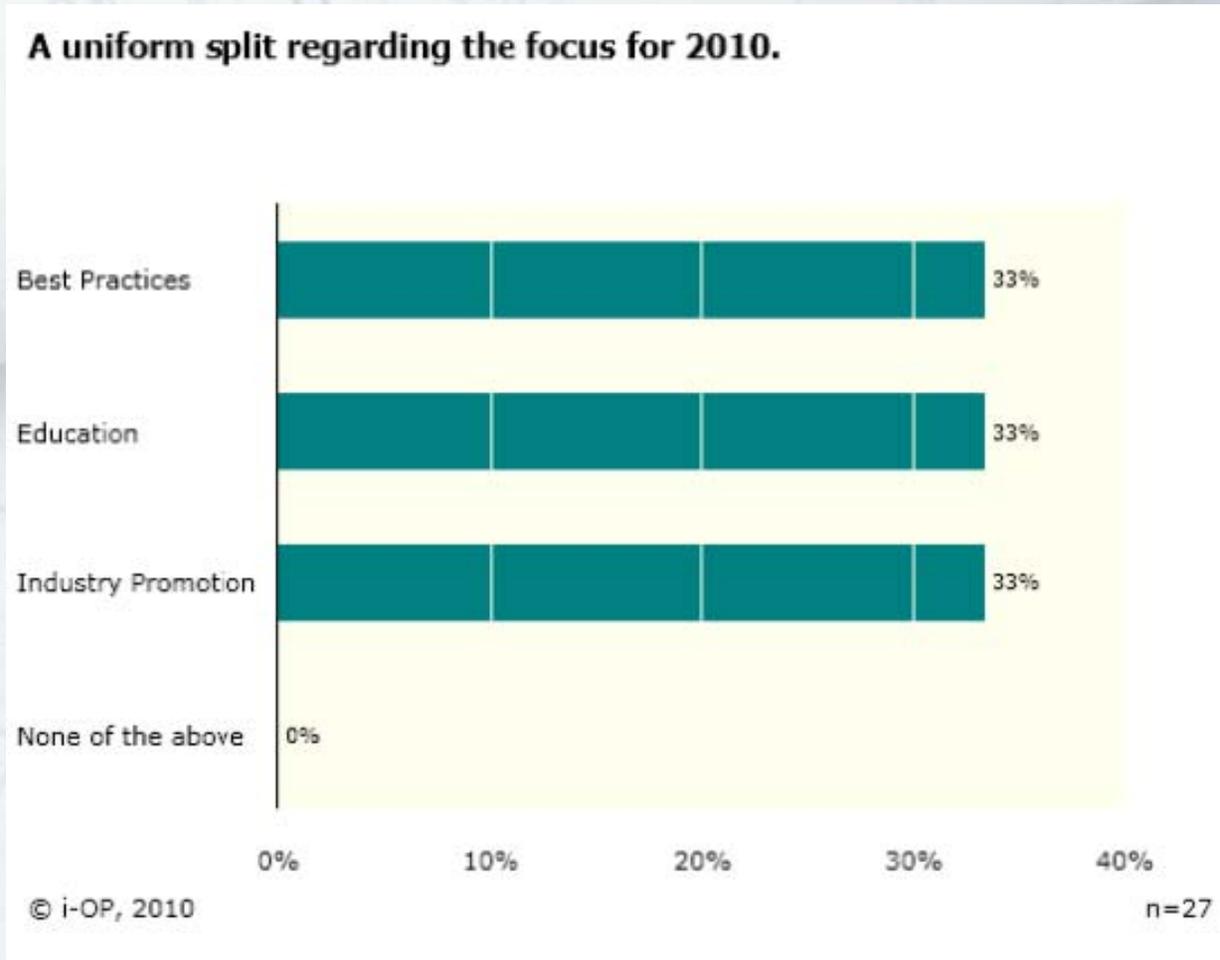
Opportunities exist for improving the BCA's alignment to its mission.



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n=27

# Mission has Balanced Support



# Why are “Best Practices” the most important mission for BCA in 2010?

- “The best practice documents are clear and concise tools that can be used to educate those who are in the industry and those who want/need to employ our services to improve the operation and energy goals.”
- “BCA certification and Best Practices set the highest standard for Cx practice. Somebody has to represent high quality.”
- “BCA is the only organization solely dedicated to Cx....as the most focused group, the BCA should be the authority on what constitutes best practices to preserve the quality of the industry and its benefit to society because it is not diluted by other efforts in other industries.”



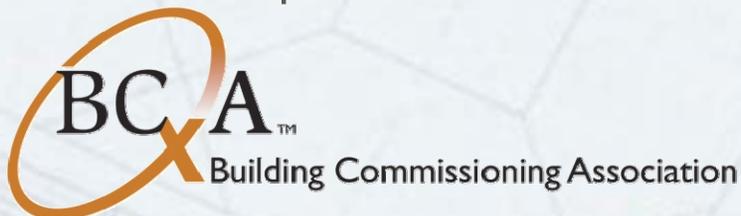
## Why is “Promoting the Industry” the most important mission for BCA in 2010?

- “As we promote the industry more people will recognize BCA as the industry leader and join the organization. It's all about membership and certifications that will drive us to improve training and Best Practices.”
- “The Design and Construction Industry has limited awareness of the BCA.”
- “With the economy, it is a definite benefit to owners and operators, not to mention our industry, to inform and market the Cx services actively.”



# Why is “Education” the most important mission for BCA in 2010?

- “From what I can tell, people are really seeking and needing technical training in earnest. They understand the process, but they don't know what to do necessarily when they are out performing the process and see a system or machine doing something.”
- “Best practices and education go hand in hand. We need to be the leader in best practices and then to educate the industry on these practices. In my opinion, lack of education is holding back the development of building commissioning.”
- “Education is the start of everything else. We need to improve the education of our clients (what we can do for them), we need to educate the design trades (how we can better partner with them and show them we are not a threat), we need to educate the build industry (how our process can help them on site), and lastly, our own industry members on better Cx practices. Education is the key and should be our focus.”



## What are the core goals you think this organization should set as its mission? (23 responses)

Most agree our goals are strong. But our ability to increase resources (volunteers and financial capital) continue to slow us down. Many believe we need to add this idea as a goal.

Other themes support the mission

Path to certification – Education

Understanding and promoting environment impacts – Education and Promoting the Benefits

Chapter development – Education

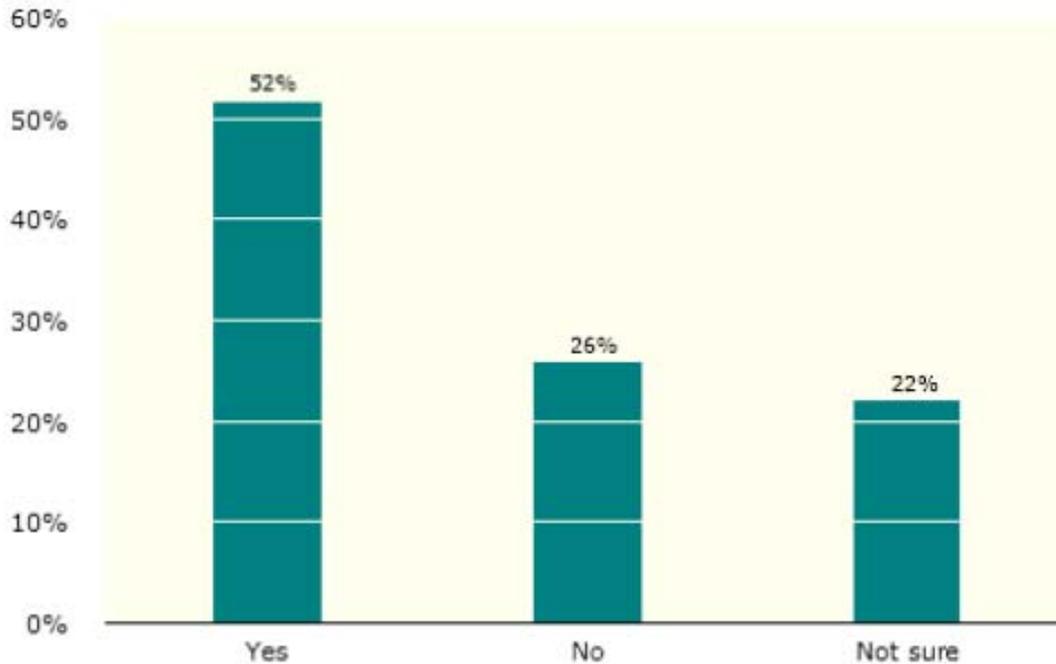
Core competencies and standards – Best Practices

# “Mission Statement Fatigue” is starting to appear.

- “Mission should remain the same. Executing goals needs better traction and quicker results.”
- “We should not spend any time discussing the Mission statement. Especially wordsmithing it. We have more important topics to discuss.”
- “The organization appears to be moving very slowly with regard to its mission statement. Other commissioning organizations appear to be making more progress or headway in terms of having influence on the commissioning industry.”

# Value of Certification Unclear

**A slight majority believed that the Certified Commissioning Professional program raises professional standards and provides a vehicle for certification in the building commissioning industry.**



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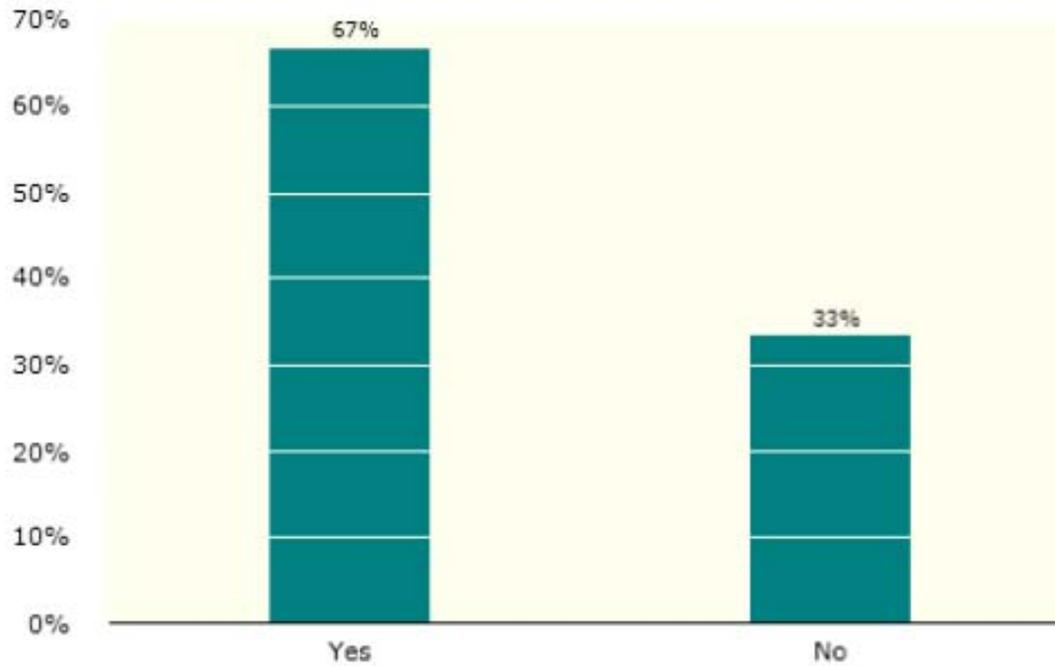
# Why is it Certification's Value Unclear?

- “If there weren't so many undistinguished certifications options out there it would probably already be necessary. So we're getting our people certified. But to us it's just a necessary action and not particularly valuable.”
- “...BCA has set the bar too high and the owners do not have access to multiple BCA certified professionals in many parts of the nation. BCA need to carefully think about the future of the certification program, especially when many are looking in to getting ASHRAE's certification. This should be part of 2010 strategic priority of the BCA board.”
- “The program's eligibility criteria did not seem to be representative of the needs of Owner's or Cx provider's. This criteria remained for many years and as a result, somewhere less than 100 people became certified while other organizations blossomed. Do you really need to ask if this sort of program is a good value for the vast majority of Owners and Cx providers?”



# Chapter Involvement Isn't Universal

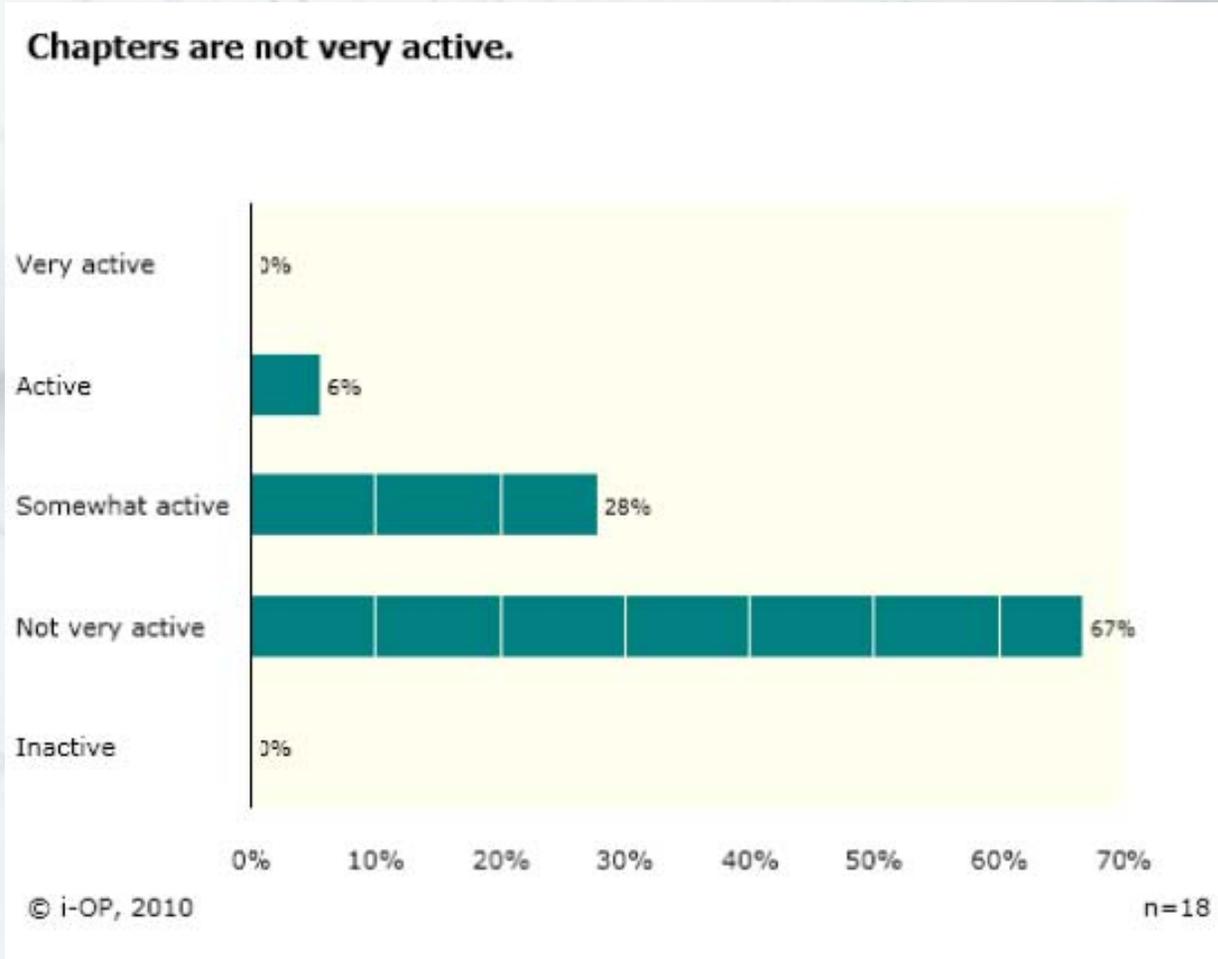
**Two-thirds of the BCA leadership are involved with their local chapters.**



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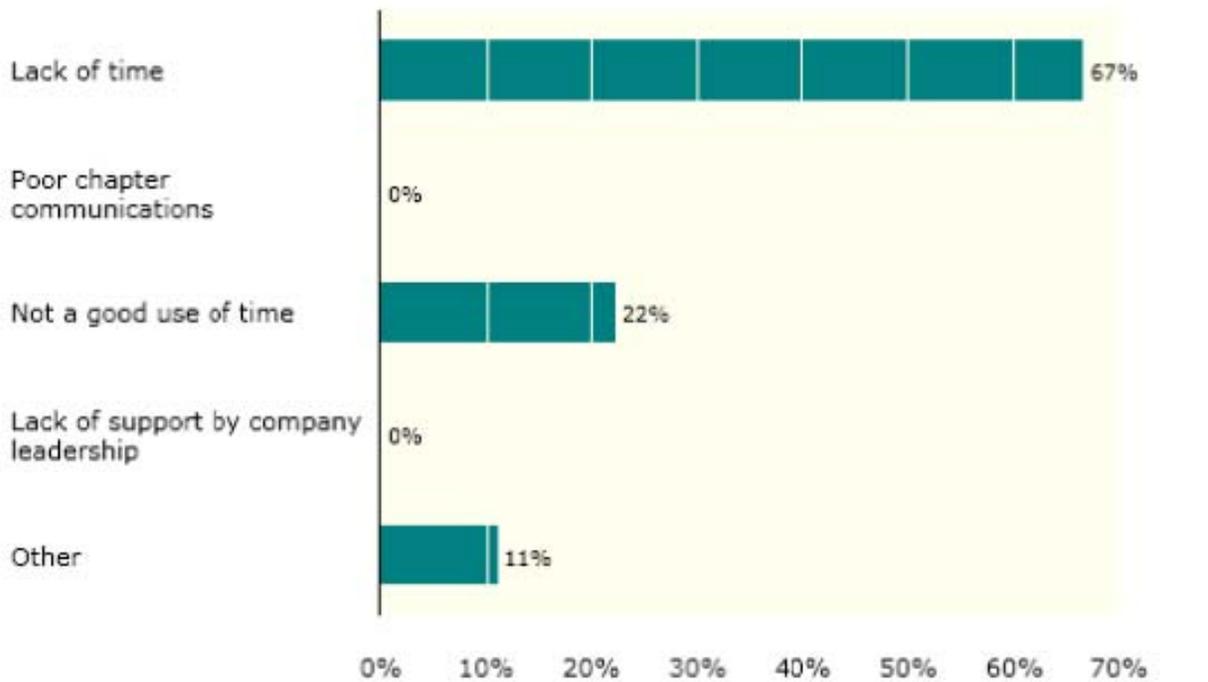
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# Chapter Activity Could Improve



# Chapter Involvement Takes Time

Those not involved with local chapters cite the problem being a lack of time.

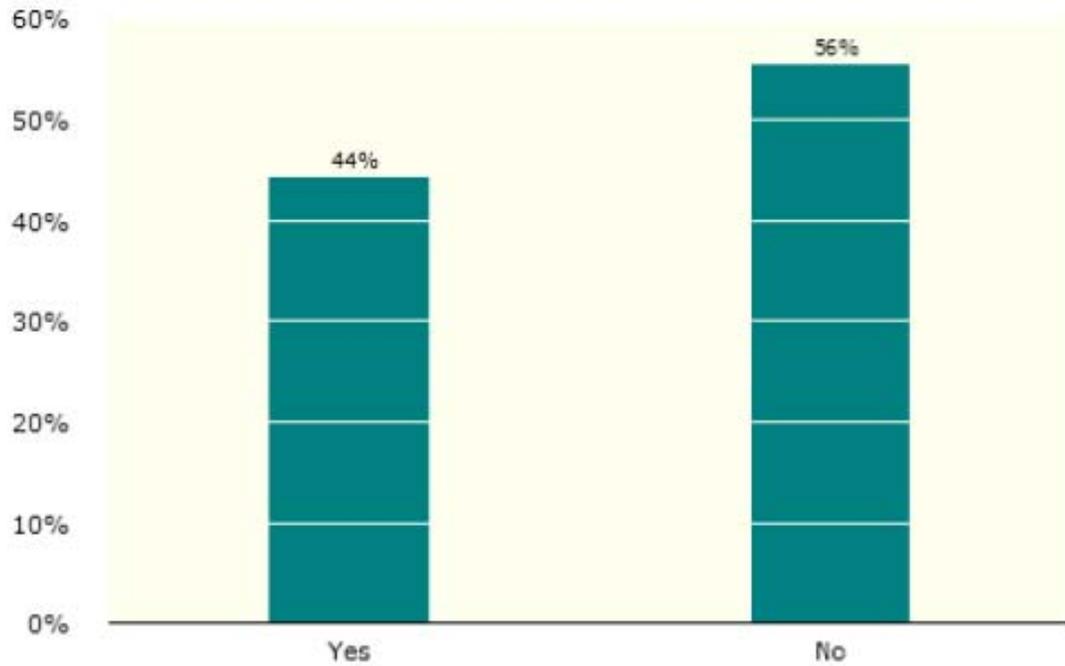


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# Committee Involvement

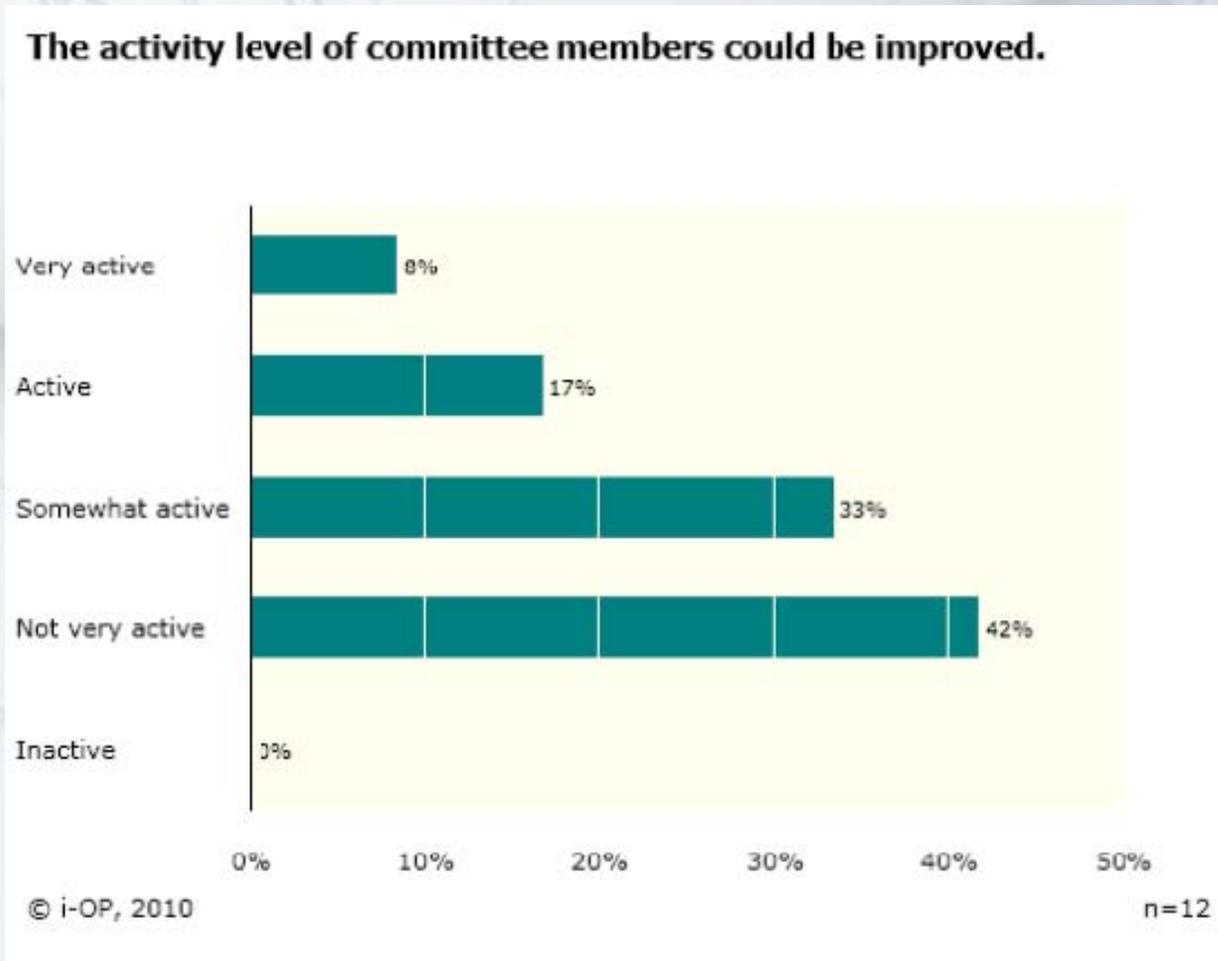
**A majority of BCA leadership are not involved with committees.**



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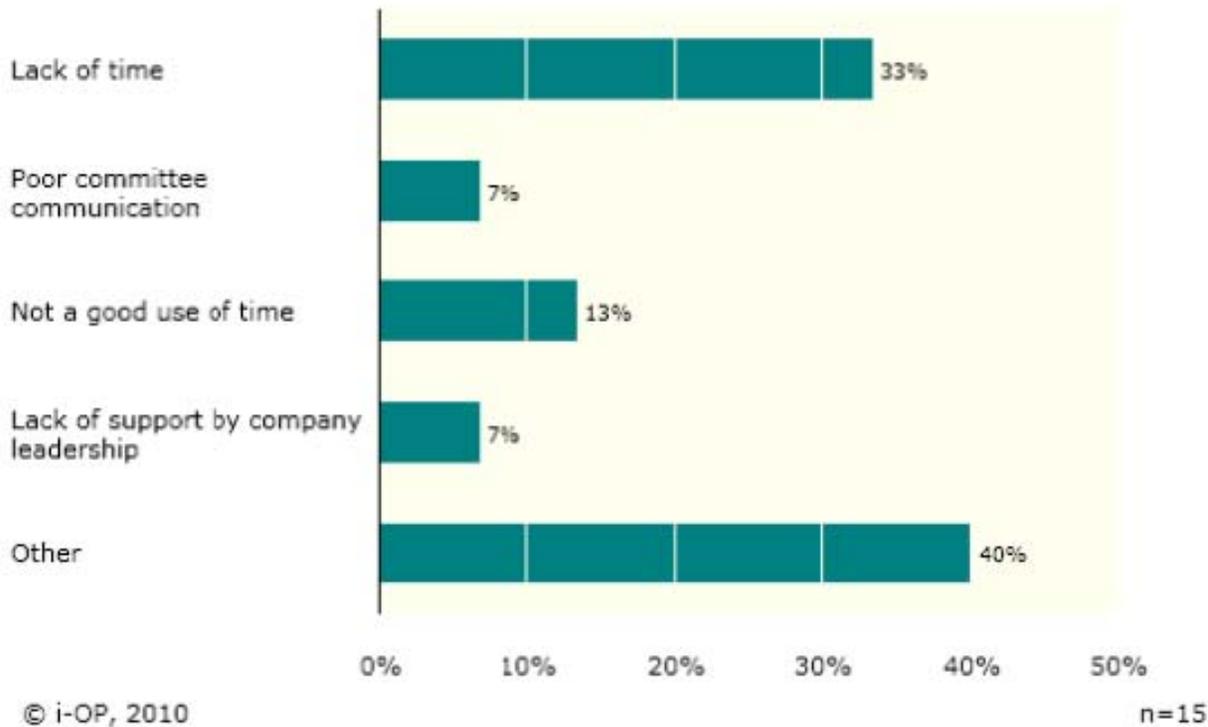
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# Committees Not Seen By Those Involved as Very Active



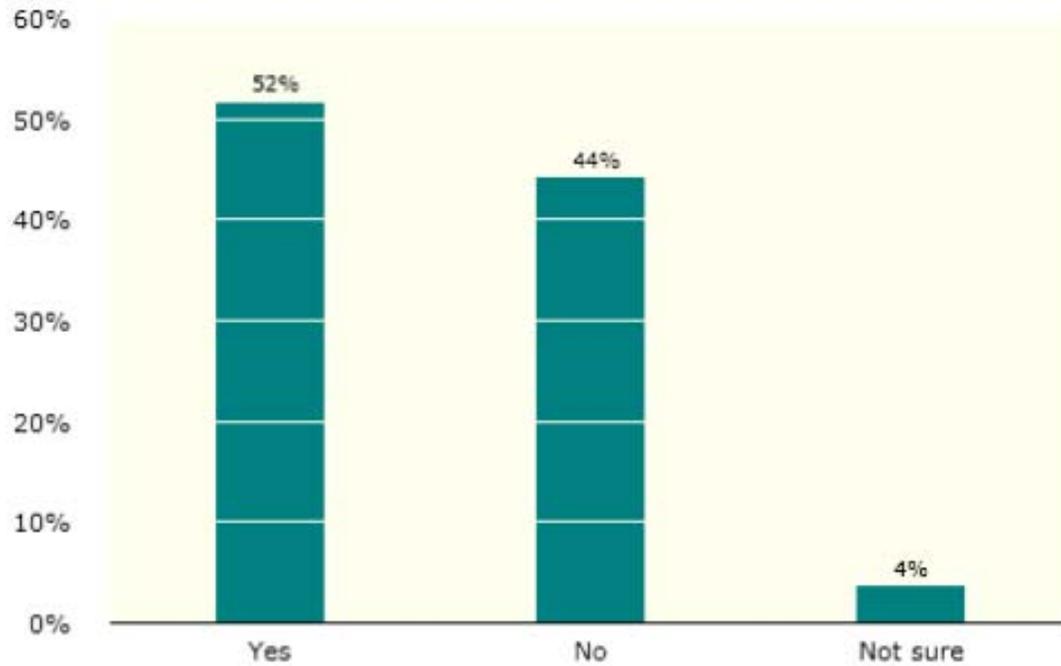
# Committee Involvement Takes Time

Most cite "other" reasons for not being involved with committees.



# Commissioning Templates Somewhat Useful...

**A slight majority of respondents use commissioning templates.**

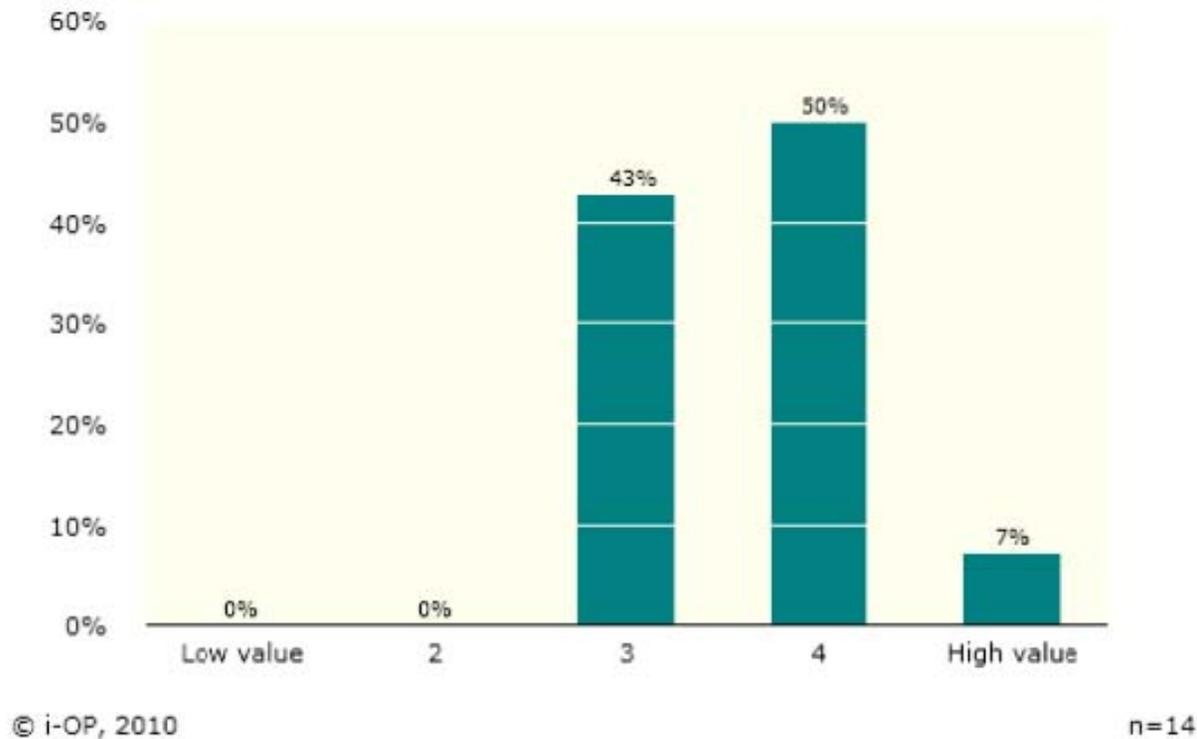


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# ...but Templates are not Highly Valued

Of those that use the templates, only a slight majority find them to be valuable.

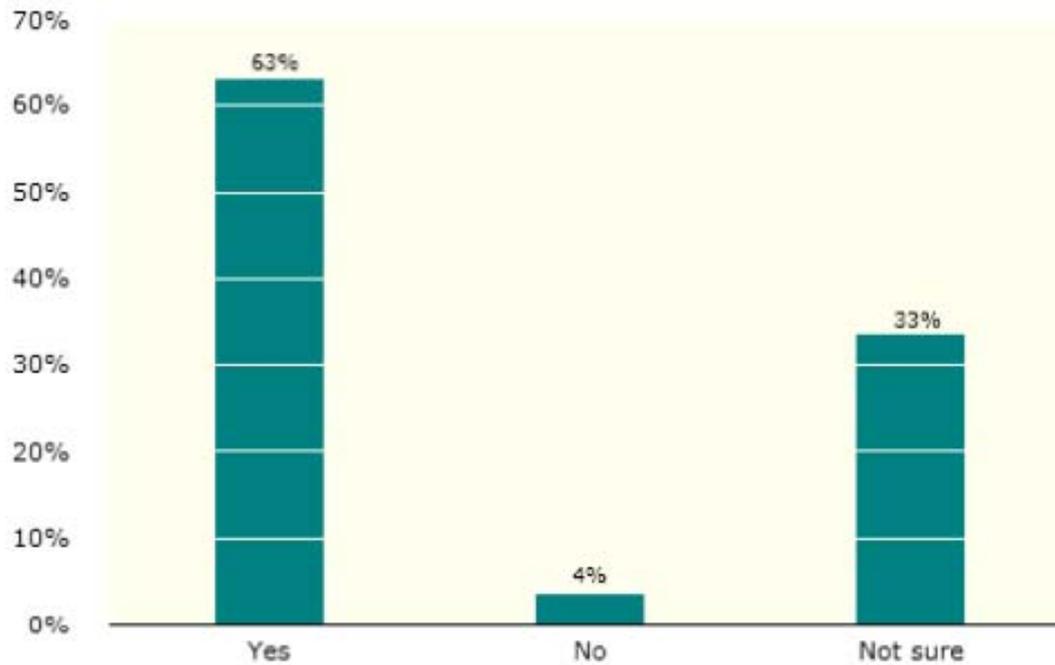


## Why aren't Templates Valued? Redundancy.

- “We have developed our own templates which share some similarities with the BCA templates.”
- “Have my own.”
- “We have our own templates and tools.”
- “Didn't know about them, and I have templates I use already.”
- “They are too generic for my tastes, plus I have developed my own after 17 years of commissioning. In other words, I have no use for them.”
- “As a commissioning provider, we have developed our own standards and templates. Once these are developed, those offered by BCA of limited benefit.”

# There May Be Value in Adding New Templates

There is minimal opposition to the idea of adding new templates.



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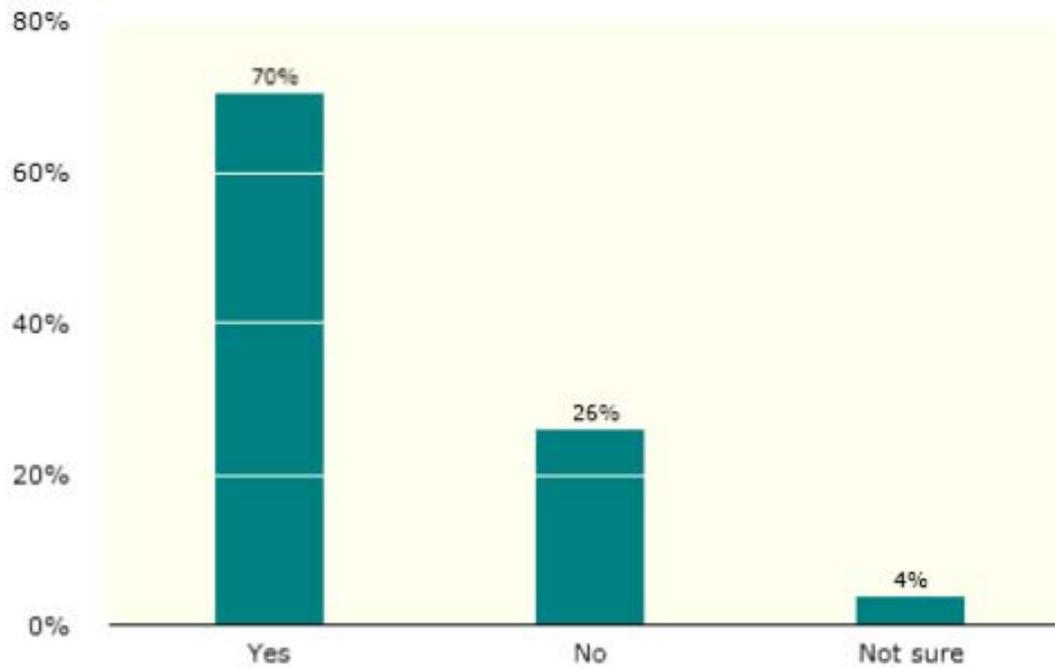
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## Many Suggestions for New Templates – Especially with Renewables and Existing Buildings

- “Building Enclosure Solar Hot Water Photovoltaic”
- “...electrical systems, plumbing systems, existing building commissioning, etc.”
- “Functional Testing Templates (Most are all Construction Checklists) Electrical (Especially Photovoltaic) Specialty Systems (Elevator, Security, CCTV, Fire Alarm, Fire Suppression) Building Envelope”
- “Renewable Energy Systems System retro commissioning templates – example chiller system, etc. LEED commissioning checklists (EB / NC)”
- “More in-depth control systems Plumbing systems Laboratory systems Energy recovery systems.”

# Essential Attributes are Valued

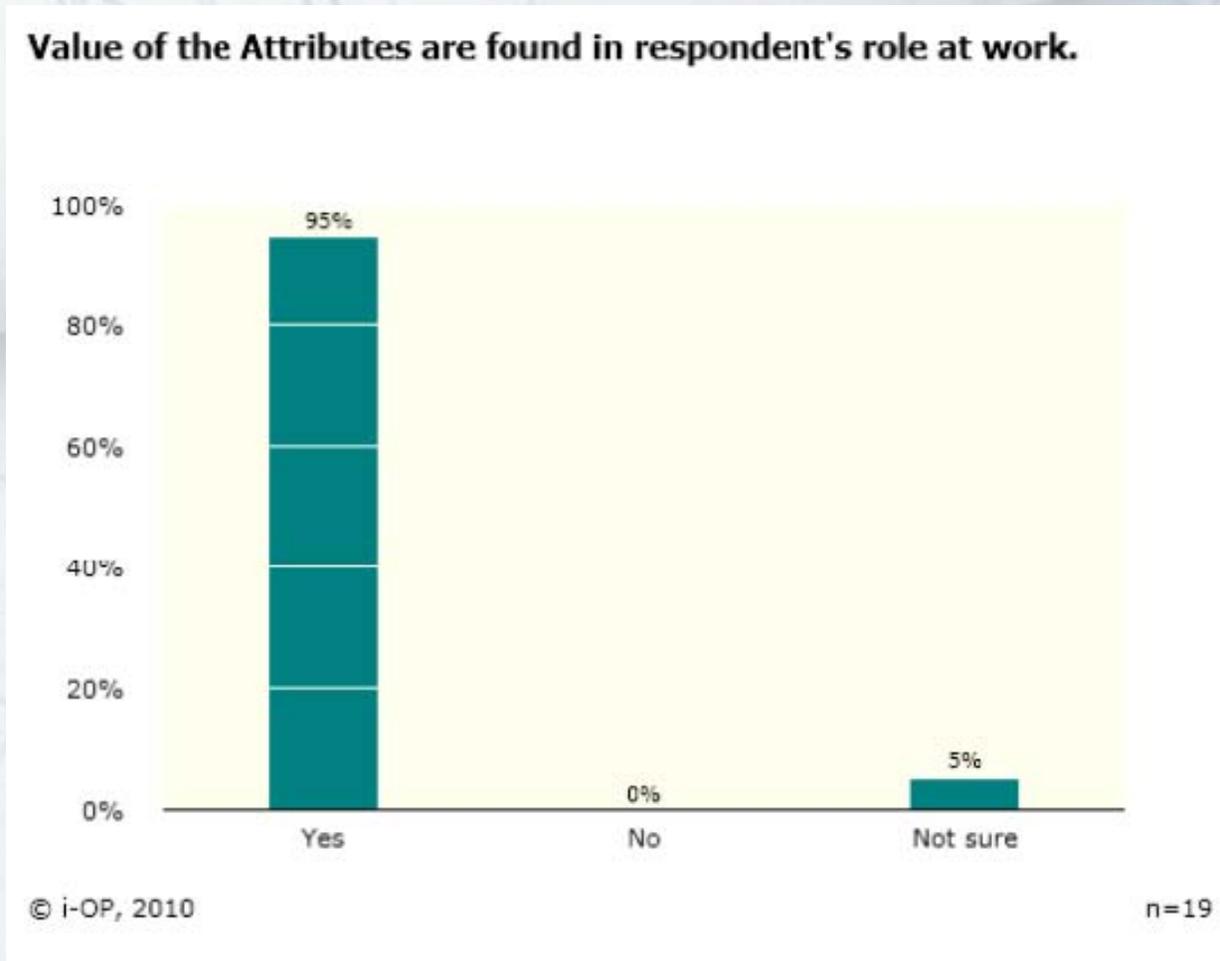
**Most consult the Essential Attributes of Building Commissioning in their job.**



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# Do you currently consult these Attributes in your job?

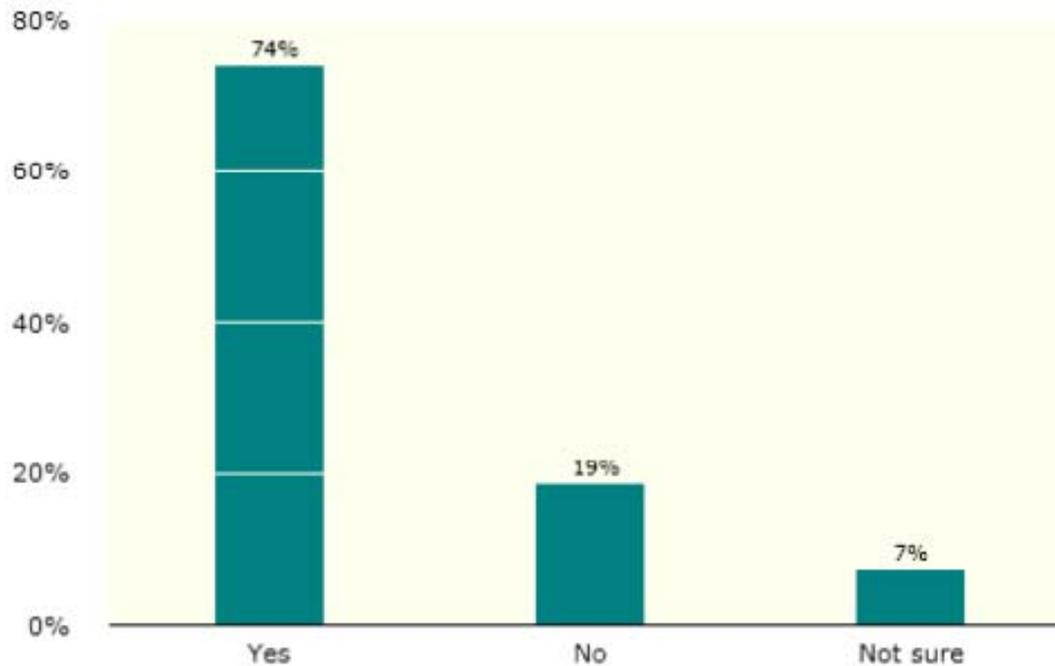


# Why are the Attributes Valuable?

- “They are the guiding benchmark as to my own and my firms outlook to our work.”
- “Clear expectations, the importance of defining scope of process and systems.”
- “They keep in mind what the commissioning services should be. Many things such as LEED and budgets keep pulling everyone away from doing everything that should be done.”
- “Engineering in general often involves some judgment, and things can usually be done more than one way correctly. Cx is no different. The attributes help establish a minimum quality standard or guideline that helps me make sure I'm providing value.”
- “They set an ethical standard that I truly believe in and fully support. They set us apart for other Cx associations that do not rely on core attributes.”

# Best Practices Are Widely Used

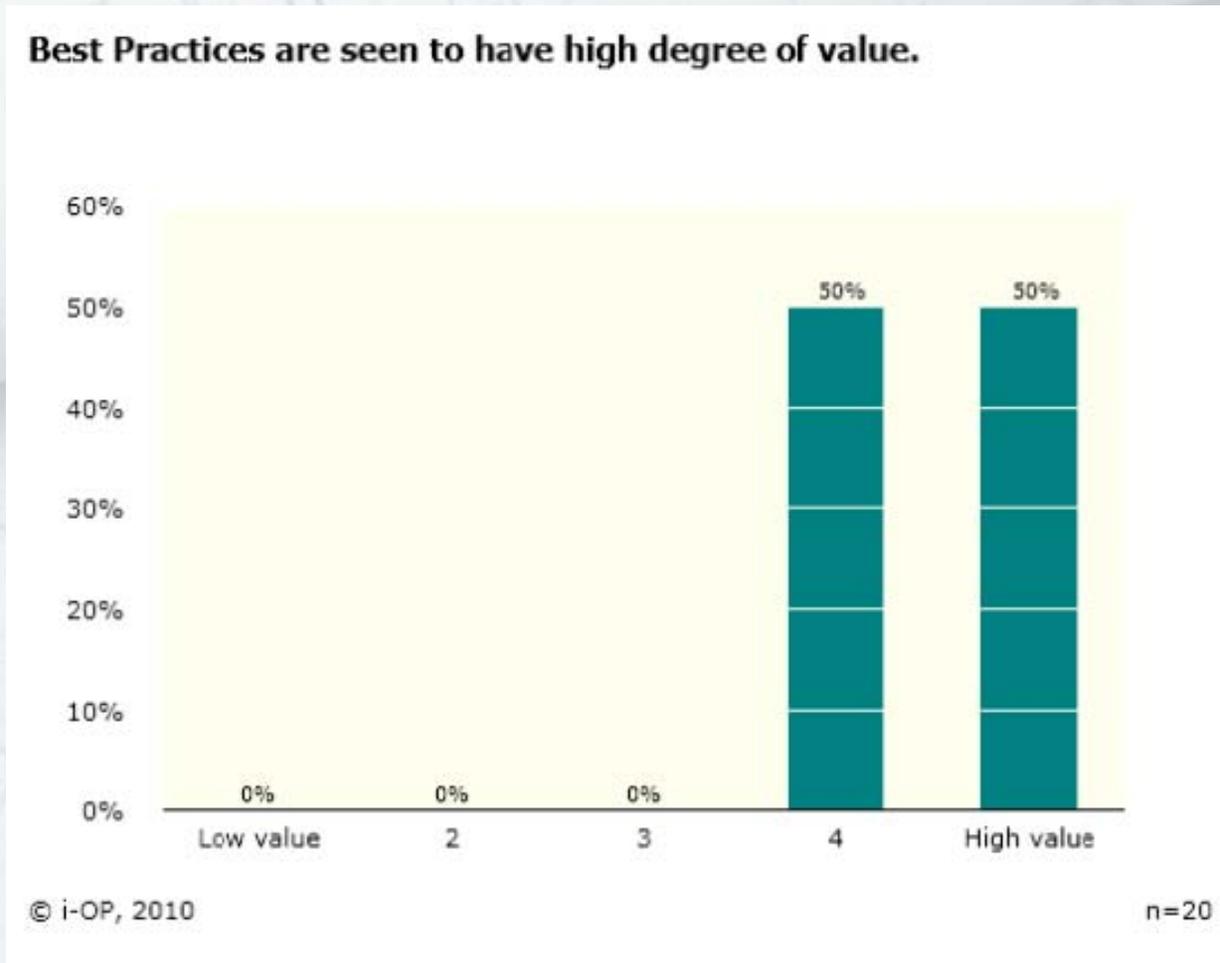
**Most consult the Best Practices for Existing Building Commissioning in their job.**



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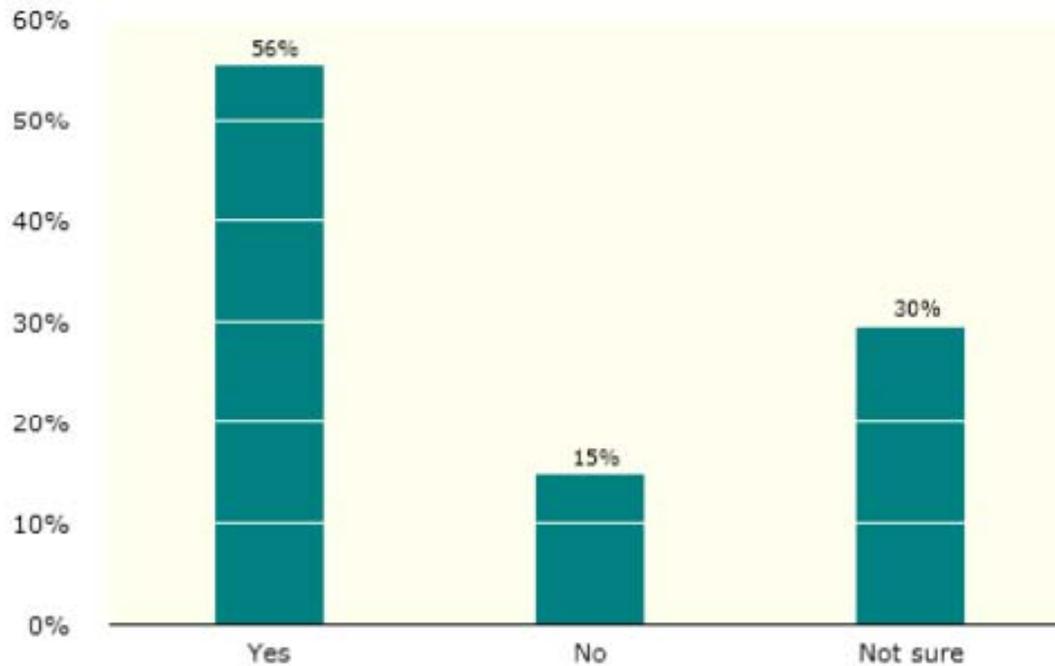
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# Best Practices Seen as Valuable



# Lack of Clarity about New Best Practices

**A slight majority would like to add Best Practices for other professions; many are unsure.**

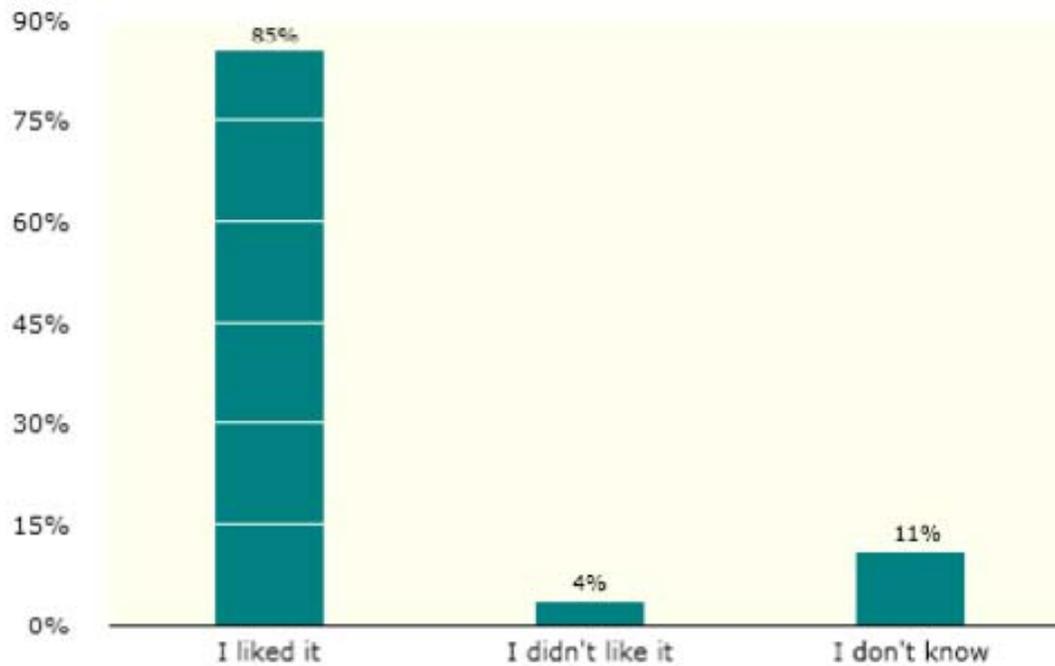


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# The Survey Enjoyed Leadership Support

Respondents tended to appreciate this survey.



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# Review of Key Findings

- The BCA enjoys the support of its leadership, who finds it to be very valuable to the industry, their companies and their personal development.
- There is a need to move past the discussion of the mission statement and move on to the action items that support the BCA's Mission.
- There is a need to improve the value of Certification, Chapter and Committee Involvement.
- There is a desire to build membership off the successes of Education, Best Practices (especially the Essential Attributes).