

SEP 25 1997

*M. Tita*

*M. Russo*

*D. Dorian*  
*(for files)*

# **NEMI**

## **IAQ Services Program Status and Financial Report**

for the

**Labor Management Committee**

**AUGUST, 1997**

TCAL0153051

**Program Status Report  
Indoor Air Quality Services Program**

**August 1997**

**I. Program Planning and Administration**

***Activities Undertaken***

Dick Peck spoke with Mike Sullivan, General Secretary Treasurer of the SMWIA and NEMI Board and Finance Committee member several times during the month of August to plan an upcoming Finance Committee meeting.

Dick Peck spoke with John Unger of US Sheet Metal and a NEMI Board and Finance Committee member to plan and discuss a meeting of the Finance Committee in September. Items for the agenda include the administrative and T.I. budgets, as well as the status of the Arizona State University contract.

Dick Peck spoke with Art Moore, General President of the SMWIA, during the month of August to review NEMI's projects, including duct cleaning, indoor air quality, energy management, cleanroom protocol, etc.

Dick Peck spoke with Frank Powell during the month of August to get his response and ideas as they relate to the new NEMI/SMACNA indoor air quality manual.

Dick Peck spoke with Eli Howard, former NEMI employee and current SMACNA employee, to discuss the NEMI/SMACNA IAQ manual.

Dick Peck spoke with Dennis Bradshaw of SMACNA to discuss the NEMI/SMACNA partnership and the current status of the indoor air quality manual.

Dick Peck met with Mike Sullivan during the month of August to review items on the agenda (budgets of T.I. and administrative, ASU contract, 1996 audit, etc.) for the Finance Committee meeting scheduled for September.

Frank Powell continued to review the NEMI/SMACNA IAQ manual.

Dick Peck met with the Strategic Planning Group several times during the month of August.

Dick Peck spoke with Alex Willman, former NEMI IAQ engineer, who is working with NEMI in a consulting manner to help with government related IAQ issues.

Richard Jackson took the exam to become a Certified Indoor Air Quality Professional. This certification program is the IAQ industries recognized stamp of approval. While the exam covered very general knowledge of the field, the designation should help lend credibility to future IAQ presentations and publications.

Richard Jackson and eight others attended the Strategic Planning Group Meeting, discussing issues of the D.O.T. building investigation for AFGE.

Jim Golden met with Dick Peck to discuss NEMI's alliance with SMACNA and SMWIA: re: IAQ issues. It appears this mutual cooperation is continuing.

Jim Golden talked with Jim Savarese: re: Strategic Planning Group activity.

#### ***Activities Planned***

Dick Peck will meet with Mike Sullivan in September prior to the NEMI Finance Committee meeting to discuss NEMI-related items such as the Arizona State University contract, cleanroom protocol, indoor air quality, etc.

Dick Peck will attend the NEMI Finance Committee meeting during the second week of September.

Dick Peck will attend meetings of the Strategic Planning Group during the month of September.

Dick Peck will speak with Frank Powell on the AFGE/D.O.T. buildings in Washington, D.C.

Dick Peck plans to meet with Alex Willman and Rich Jackson during the first week of September to review how NEMI could benefit from Alex's knowledge of government related IAQ issues.

Dick Peck plans to speak with the SMWIA General President during the month of September to review items for discussion by the Finance Committee and to discover information relating to upcoming NEMI Board of Directors meetings. Dick would like the full Board to know of NEMI's current activities (cleanroom protocol, ASU contract, duct cleaning, indoor air quality, etc.).

Richard Jackson plans on assisting the NEMI HQ office by getting "on line" during the month of September. This will allow them to get IAQ information off the internet.

Jim Golden will continue to assist Jim Savarese and Dick Peck as requested.

## **II. Marketing, Public Relations and Industry Promotion**

### ***Activities Undertaken***

Dick Peck spoke with Paul Bond of Affiliated Graphics to discuss marketing NEMI's indoor air quality program.

Dick Peck met with Jack Webster, NTF Service Coordinator, during the month of August to discuss NEMI/NTF joint activities, such as the Cleanrooms seminars.

Dick Peck spoke with Bill Butler of the SMWIA to discuss marketing NEMI's indoor air quality program.

Dick Peck reviewed the field staff's reports on their marketing meetings with various Industry officials during the past months. They were each assigned to meet with as many SMWIA Business Managers/Agents and SMACNA representatives as possible to promote NEMI's current activities (cleanroom protocol, indoor air quality, energy management, ASU, etc.).

Dick Peck spoke with Charles Henson, Business Manager of SMWIA Local 100 and newly elected Vice President of the SMWIA, to discuss

sheet metal man-hours for his local through work to improve indoor air quality.

Dick Peck assigned Rich Jackson to create an ad to be used for the SMACNA convention.

Richard Jackson attended a luncheon meeting of the Maryland AFL-CIO and spoke with Paul Bond of Affiliated Graphics about NEMI IAQ problems.

***Activities Planned***

Dick Peck plans on sending various Business Managers a list of all National Air Duct Cleaners Association (NADCA) members in their area, with a note that NEMI can assist with any indoor air quality questions.

Dick Peck plans to discuss NEMI's marketing of its indoor air quality program with Paul Bond and Bill Butler of Affiliated Graphics for possible use in an upcoming Sheet Metal Workers' Journal magazine.

Dick Peck will work with Rich Jackson to create an ad for SMACNA's annual convention newspaper.

Richard Jackson will be attending the Healthy Buildings/IAQ conference in Washington, D.C. in September.

Jim Golden will assist Jim Savarese and Dick Peck as requested.

**III. Public Affairs and Government Relations**

***Activities Undertaken***

Dick Peck assigned staff to attend a luncheon of the Maryland AFL-CIO in early August. They reported back to him that various Maryland government officials attended and they promoted NEMI and what NEMI is currently working on relating to indoor air quality.

Frank Powell reviewed various California State legislation.

Richard Jackson attended a meeting of the Maryland AFL-CIO during the first part of August. Many Maryland state officials were in attendance.

Jim Golden discussed NEMI's IAQ activity with various government agencies.

***Activities Planned***

Dick Peck plans on meeting with Alex Willman to discuss how he can help promote NEMI's IAQ program to various government jurisdictions.

Frank Powell plans on contacting various State of California officials to discuss their ideas on indoor air quality.

Frank Powell will continue to review various IAQ legislation.

Richard Jackson has held open the last two weeks of October for a possible IAQ survey of the D.O.T. building.

Richard Jackson will continue to review the documents provided by AFGE on possible IAQ problems.

**IV. Instructor, Technician & Contractor Training**

***Activities Undertaken***

Dick Peck is reviewing ideas that have been offered by the NEMI staff on what kind of training NEMI could provide contractors as it relates to their indoor air quality needs.

Dick Peck and Rich Jackson discussed what local training could be supported by NEMI staff for their area contractors in indoor air quality.

Dick Peck spoke with Dennis Bradshaw during the month of August to discuss his ideas on how NEMI can help SMACNA with promoting the new IAQ manual to their contractors. Classes may be offered for the interested contractors to explain the differences in the last manual and the new one.

Dick Peck spoke with John Unger of US Sheet Metal to gauge his reaction relating to local area IAQ seminars.

Dick Peck contacted various SMACNA contractors to discuss how NEMI may be able to help them get their IAQ programs started.

Richard Jackson continues to develop a plan for marketing education on IAQ and Energy Management, which would stress the need for qualified trained technicians, for HVAC construction and service to maintain IAQ and energy efficiency.

***Activities Planned***

Dick Peck plans to continue to contact SMACNA contractors to determine the need for small-local area IAQ seminars.

Dick Peck will continue to work with Eli Howard to get the NEMI/SMACNA IAQ manual together. This will be offered to the SMACNA contractors to train them in IAQ areas.

Dick Peck will assign various staff members to meet with signatory contractors in the coming months to assist them get work within the IAQ arena.

Richard Jackson plans to continue the development of marketing educational material for IAQ and Energy Management.

**V. Engineering and Pilot Projects**

***Activities Undertaken***

Dick Peck reviewed comments from NEMI staff regarding Frank Powell's remarks on the new SMACNA indoor air quality manual.

Frank Powell spoke with Alex Willman, Rich Jackson and Dick Peck by phone to discuss various IAQ/engineering issues.

Frank Powell continued to review and comment on a "summary report" of the efforts and studies of the D.O.T. during the month of August.

Richard Jackson attended the Association of Energy Engineers Fundamentals of Indoor Air Quality course. One of the presenters, H.E. Barney Burroughs is the past president of ASHRAE, serving in 1988, and was very active in the development of ASRAE Standard 62-1989. While addressing proposed standard 62R, Mr. Burroughs said that Standard 62 has been placed under continuous maintenance, and that there would be two separate standards, 62.1 which would address commercial property, and 62.2 which would apply to residential property. This information matched the information received from ASHRAE in a Standards Action newsletter. As this document is under continuous maintenance, any party can request modification at any time. The 62 Committee only addresses comments at their meetings however. To be eligible for consideration at the ASHRAE Winter meeting in January, proposed changes must be received by September 20th. Also 62.1 will likely exist as two versions, a code version, and a guidance version. Mr. Burroughs went on to say that the current 62-1989 will most likely move into the 62.1 code version immediately. Mr. Burroughs said that the current 62-1989 will probably be converted into mandatory language, and the less controversial areas of 62R will likely be adopted as modifications. Proposed 62R will likely be the model for the guidance version.

Richard Jackson read Dr. Shirley Hansen's book Managing Indoor Air Quality to review for CIAQP exam.

Richard Jackson reviewed files and trade literature for information on stachybotrys fungus based on the review of D.O.T. building reports.

Richard Jackson is developing outlines for NEMI information System topics. Topics originally offered will include IAQ, energy management, cleanrooms, commissioning, and duct cleaning. Final outline to be completed in September 19, 1997.

#### **Activities Planned**

Dick Peck plans on speaking with Alex Willman to gather his thoughts on how he could help NEMI's engineering department with indoor air quality issues.

Dick Peck plans on keeping Frank Powell assigned to various IAQ issues.



Frank Powell will review any information forwarded to him from NEMI related to IAQ issues.

Richard Jackson plans to continue developing outlines for NEMI Information System topics.

Richard Jackson plans to attend an HVAC Commissioning course at UW-Madison on September 15-17, 1997.

Richard Jackson plans to attend the Healthy Buildings/IAQ '97 conference in Bethesda, MD. on September 27 to October 2, 1997.

Richard Jackson plans to attend an Strategic Planning Group meeting at NEMI H.Q. during the first week of September.

Richard Jackson plans on attending upcoming Strategic Planning Group meetings on request.

## **VI. Special Projects**

### ***Activities Undertaken and Planned***

Dick Peck has assigned Rich Jackson to work with Frank Powell, possibly Alex Willman also, on a new energy management/indoor air quality book for NEMI.

Dick Peck has assigned Rich Jackson to create new promotional material for NEMI's IAQ program.

Richard Jackson plans to author the packages based on research notes provided by myself and field coordinators.

Richard Jackson will continue to write IAQ articles for the new Information Database System.

Richard Jackson is helping to create a new energy management program for NEMI and it's effect on IAQ.

**MONTHLY BUDGET FUNDING**  
**MONTH ENDING 09/30/97**  
**INDOOR AIR QUALITY SERVICES PROGRAM - CYCLE VIII**

TASKS	12-MONTH BUDGET	BUDGET REQUEST YTD	ACTUAL SPENT YTD	ESCROW	MONTHLY REQUEST 9/97
<b>A1. GOVERNMENT RELATIONS</b>					
General & Administrative	38,580	28,935	28,935	0	3,215
Travel Related Expenses	21,444	16,083	16,083	0	1,787
Salary & Fringe Benefits	34,020	25,515	25,515	0	2,835
Professional Services	17,052	12,789	12,789	0	1,421
Strategic Planning Meetings	26,484	19,863	19,863	0	2,207
Supplies	1,200	900	900	0	100
<b>SUBTOTAL</b>	<b>138,780</b>	<b>104,085</b>	<b>104,085</b>	<b>0</b>	<b>11,565</b>
<b>B1. PUBLIC AFFAIRS</b>					
General & Administrative	35,160	26,370	26,370	0	2,930
Travel Related Expenses	26,928	20,196	20,196	0	2,244
Salary & Fringe Benefits	31,272	23,454	23,454	0	2,606
1-800-Hotline	1,920	1,440	1,440	0	160
<b>SUBTOTAL</b>	<b>95,280</b>	<b>71,460</b>	<b>71,460</b>	<b>0</b>	<b>7,940</b>
<b>C1. STATE PROJECTS &amp; PROGRAMS</b>					
General & Administrative	33,648	25,236	25,236	0	2,804
Travel Related Expenses	29,280	21,960	21,960	0	2,440
Salary & Fringe Benefits	52,452	39,339	39,339	0	4,371
Supplies	372	279	279	0	31
<b>SUBTOTAL</b>	<b>115,752</b>	<b>86,814</b>	<b>86,814</b>	<b>0</b>	<b>9,646</b>
<b>D1. TRAINING</b>					
Travel Related Expenses	8,760	6,570	6,570	0	730
Salary & Fringe Benefits	57,288	42,966	42,966	0	4,774
Supplies	708	531	531	0	59
<b>SUBTOTAL</b>	<b>66,756</b>	<b>50,067</b>	<b>50,067</b>	<b>0</b>	<b>5,563</b>
<b>E1. INDUSTRY RELATIONS</b>					
General & Administrative	13,488	10,116	10,116	0	1,124
Travel Related Expenses	8,484	6,363	6,363	0	707
Salary & Fringe Benefits	9,612	7,209	7,209	0	801
Professional Services	5,820	4,365	4,365	0	485
Supplies	624	468	468	0	52
<b>SUBTOTAL</b>	<b>38,028</b>	<b>28,521</b>	<b>28,521</b>	<b>0</b>	<b>3,169</b>
<b>F1. ADMINISTRATIVE SUPPORT</b>	<b>45,396</b>	<b>34,047</b>	<b>34,047</b>	<b>0</b>	<b>3,783</b>
<b>TOTAL EXPENSES</b>	<b>499,992</b>	<b>374,994</b>	<b>374,994</b>	<b>0</b>	<b>41,666</b>

TCAL0153060

**FINANCIAL SUMMARY  
FOR THE MONTH AND YEAR ENDING 9/31/97  
INDOOR AIR QUALITY SERVICES PROGRAM - CYCLE VIII**

	— CURRENT PERIOD —			— YEAR-TO-DATE —			TOTAL BUDGET
	ACTUAL	BUDGET	VARIANCE	ACTUAL	BUDGET	VARIANCE	
<b>INCOME</b>	0	41,666	(41,666)	291,662	333,328	(41,666)	499,992
<b>EXPENSES</b>							
<b>A1. GOVERNMENT RELATIONS</b>							
General & Administrative	3,215	3,215	0	25,720	25,720	0	38,580
Travel Related Expenses	1,787	1,787	0	14,296	14,296	0	21,444
Salary & Fringe Benefits	2,835	2,835	0	22,680	22,680	0	34,020
Professional Services	1,421	1,421	0	11,368	11,368	0	17,052
Strategic Planning Meetings	2,207	2,207	0	17,656	17,656	0	26,484
Supplies	100	100	0	800	800	0	1,200
<b>SUBTOTAL</b>	<b>11,565</b>	<b>11,565</b>	<b>0</b>	<b>92,520</b>	<b>92,520</b>	<b>0</b>	<b>138,780</b>
<b>B1. PUBLIC AFFAIRS</b>							
General & Administrative	2,930	2,930	0	23,440	23,440	0	35,160
Travel Related Expenses	2,244	2,244	0	17,952	17,952	0	26,928
Salary & Fringe Benefits	2,606	2,606	0	20,848	20,848	0	31,272
1-800-Hotline	160	160	0	1,280	1,280	0	1,920
<b>SUBTOTAL</b>	<b>7,940</b>	<b>7,940</b>	<b>0</b>	<b>63,520</b>	<b>63,520</b>	<b>0</b>	<b>95,280</b>
<b>C1. STATE PROJECTS &amp; PROGRAMS</b>							
General & Administrative	2,804	2,804	0	22,432	22,432	0	33,648
Travel Related Expenses	2,440	2,440	0	19,520	19,520	0	29,280
Salary & Fringe Benefits	4,371	4,371	0	34,968	34,968	0	52,452
Supplies	31	31	0	248	248	0	372
<b>SUBTOTAL</b>	<b>9,646</b>	<b>9,646</b>	<b>0</b>	<b>77,168</b>	<b>77,168</b>	<b>0</b>	<b>115,752</b>
<b>D1. TRAINING</b>							
Travel Related Expenses	730	730	0	5,840	5,840	0	8,760
Salary & Fringe Benefits	4,774	4,774	0	38,192	38,192	0	57,288
Supplies	59	59	0	472	472	0	708
<b>SUBTOTAL</b>	<b>5,563</b>	<b>5,563</b>	<b>0</b>	<b>44,504</b>	<b>44,504</b>	<b>0</b>	<b>66,756</b>
<b>E1. INDUSTRY RELATIONS</b>							
General & Administrative	1,124	1,124	0	8,992	8,992	0	13,488
Travel Related Expenses	707	707	0	5,656	5,656	0	8,484
Salary & Fringe Benefits	801	801	0	6,408	6,408	0	9,612
Professional Services	485	485	0	3,880	3,880	0	5,820
Supplies	52	52	0	416	416	0	624
<b>SUBTOTAL</b>	<b>3,169</b>	<b>3,169</b>	<b>0</b>	<b>25,352</b>	<b>25,352</b>	<b>0</b>	<b>38,028</b>
<b>F1. ADMINISTRATIVE SUPPORT</b>	<b>3,783</b>	<b>3,783</b>	<b>0</b>	<b>30,264</b>	<b>30,264</b>	<b>0</b>	<b>45,396</b>
<b>TOTAL EXPENSES</b>	<b>41,666</b>	<b>41,666</b>	<b>0</b>	<b>333,328</b>	<b>333,328</b>	<b>0</b>	<b>499,992</b>
<b>INCOME OVER/UNDER EXPENSES</b>	<b>(41,666)</b>	<b>0</b>	<b>(41,666)</b>	<b>(41,666)</b>	<b>0</b>	<b>(41,666)</b>	

TCAL0153061