

Meet NATE's New COO

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Building Competency in HVACR

A myriad of issues face North American Technician Excellence (NATE) in its pursuit of a patch on every arm. However, NATE is not about just getting a quantity of people to take tests, nor is it about just certifying thousands of people — though more than 32,000 hold NATE Certifications. NATE is more about helping the HVACR industry to develop competent technicians that are ready for the challenges that lie ahead. There is a huge gap between the number of qualified technicians and the number of jobs that will need to be filled in coming years. The efforts of technicians, contractors, distributors, and manufacturers to address this widening gap through their support of NATE, are evident in this eBook. Thank you for reading. It is our pleasure to also support NATE.



Mike Murphy
 Publisher
 The NEWS

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Contractors, Distributors Mutually Benefit with NATE Programs

What do contractors get from the local wholesale-distributor besides parts and a decent cup of coffee? For some, the decent cup of coffee is a stretch, but for many contractors, their wholesaler-distributors function as a primary source for equipment expertise and training opportunities. The distributor's role in training and certification of the HVACR technician is growing and a number of distributors are finding that being involved in North American Technician Excellence (NATE) is mutually beneficial to both themselves and their contractor customers.

Take distributors like Johnstone Supply, Portland, Ore., and Mingledorff's Inc., Norcross, Ga., for example. Both were honored by NATE last year at the Heating Air-conditioning & Refrigeration Distributors International (HARDI) Annual Conference. The Johnstone Supply in Denver received the Single Location Top Certifier of NATE Technicians award for being the HARDI member location certifying the most technicians. Mingledorff's received the overall Top Certifier of NATE Technicians for being the HARDI distributor who certified the most technicians across all of its branches since last year's HARDI conference.



NATE training is a part of the Mingledorff's culture and something the Norcross, Ga., distributor is finding to be mutually beneficial to itself and its customers.



NATE training sessions supplied at distributor branches is becoming a growing trend.

Each company takes a different approach to NATE promotion, but both seem to agree that encouraging NATE certification is good for the contractor.

Taking Care of Business

Johnstone Supply employs a voluntary NATE certification program and has worked across its 13 branches toward creating a testing facility at each branch for the convenience of the individual markets served. "NATE certification ensures customers [end users] that they are getting a technician that

meets a level of proficiency that has been measured against other technicians throughout the industry," said Dan Trachsel, technical specialist at Johnstone Supply, Tigard, Ore. "The customer's technician has demonstrated a preset level of proficiency."

Each branch of Johnstone Supply has been a registered NATE Training Organization for the past two years. Before that, Trachsel noted that it was up to the branches individually to determine the need in its area. The training offered to contractors is provided by in-house staff trainers as well as the multiple product trainers hosted. Each type of training qualifies for NATE continuing education hours (CEHs). The company also develops some of its own curriculum and submits it to NATE for approval so that the training developed by Johnstone Supply will also qualify for CEHs.

"When you teach the NATE material, it is imperative that you know and understand the concepts extremely well because you must present it in a way that others will be able to learn these same concepts," explained Trachsel.

Johnstone Supply is benefitting from its role in NATE training and certification. The company explained that it gets the advantage of working with a more highly trained customer that truly understands the trade.

"This means we have less frivolous warranty claims and that we are free to be a distributor at the counter level, where our customer service staff can relate better to these more highly-trained technicians and contractors," said Trachsel.

As for the contractor, Trachsel points out the value to participants' employers showing that increased warranty dollar allowances, fewer false diag-

nostics, and overall improvement of their company in the eyes of the consumer public are some of the rewards of having NATE-certified technicians on staff.

“Overall, more work and more business are getting done,” he said.

Motivating Participants

Mingledorff’s has been associated with NATE since early 2003 and has continued to enhance the program it offers to contractors and technicians.

“With the NATE certification, we feel that the service technician wants to be the best in the business, and with the support and direction of NATE and Mingledorff’s, they can be,” explained Harold Nelson, technical support manager for Mingledorff’s. “We feel overall, that the certified technicians are more professional and better informed about the equipment they install and service.”

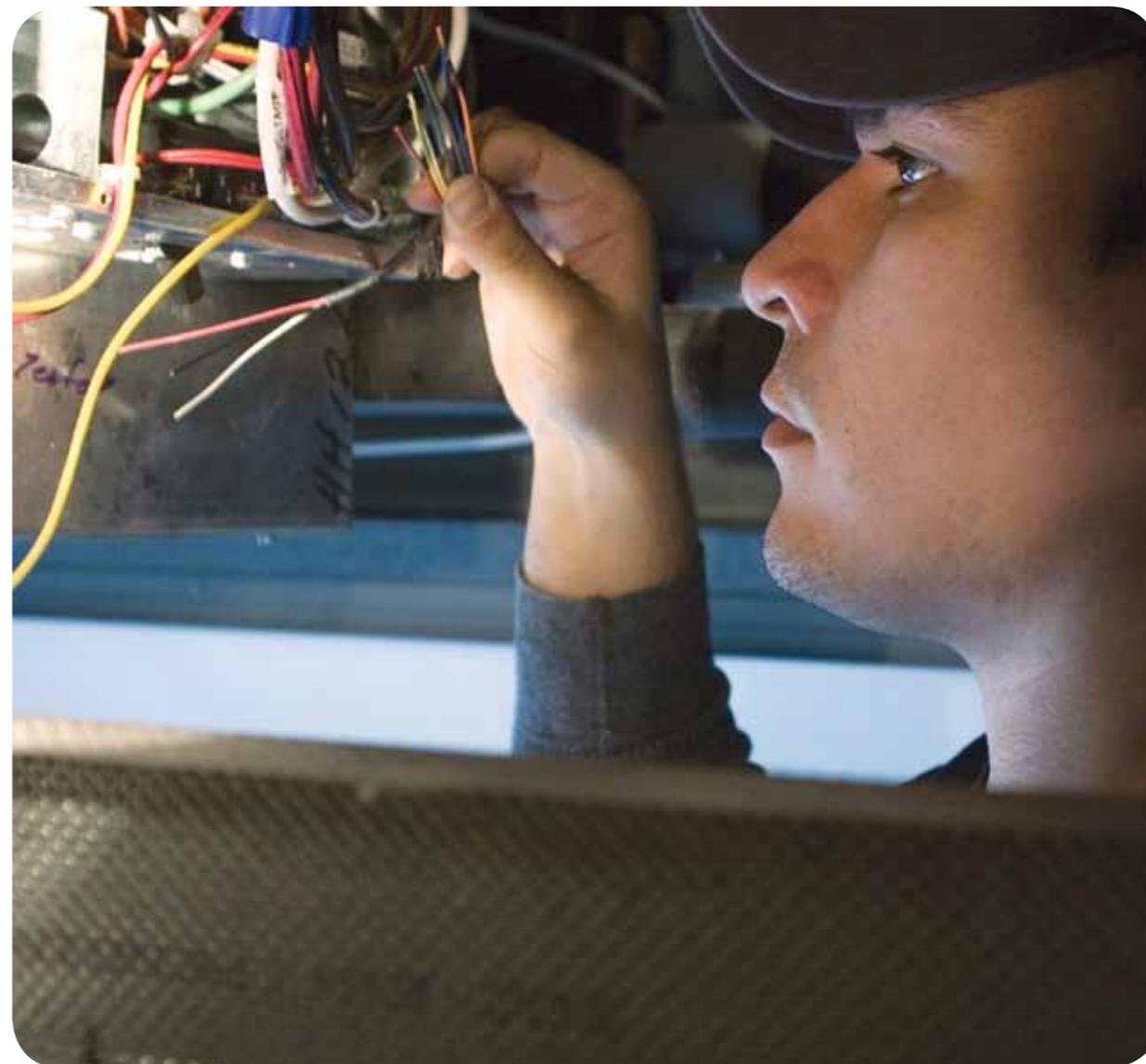
The company promotes NATE certification through local and regional media. It also posts and sends email campaigns to all of its contractors and technician customers about upcoming NATE testing dates and approved NATE CEH courses. Other benefits derived from the NATE offerings at Mingledorff’s include marketing, literature, and special training benefits for customers.

“Our sales staff continues to encourage and sign up contractors,” said Nelson. “We are seeing individuals seem more and more motivated to continue on with their own education in the HVAC industry.”

Mingledorff’s also encourages its own employees to become NATE certified as well as continue to attend NATE-recognized CEH classes to maintain their own NATE status.

Improving Brand Perception

For HVAC Distributors Inc., Mount Joy, Pa., NATE certification at the distributorship is not just about the improved quality of a distributor’s customers.



Studies are showing that NATE certification helps contractors have fewer false diagnostics, and allows for overall improvement of their company in the eyes of the consumer public.

“We offer NATE testing at the convenience of our customers to encourage participation, and have done so over the past five years” said David McIlwaine, president of HVAC Distributors Inc. “We promote our NATE certification in our newsletters and at all of our training classes.”

Joe Souza, vice president of operations for CFM Equipment Distributors, Sacramento, Calif., noted that the company he works for takes its NATE offerings a bit further and not only promotes NATE certification and training, but also provides financial co-op assistance to participating dealers.

Both Souza and McIlwaine agreed that the increase of NATE certification amongst their customers helped improve brand quality and awareness of the equipment represented on their shelves.

The continued increase in NATE awareness is becoming more evident as the number of participating distributors that offer training and certification opportunities expands.

“While a few years back NATE certification was not much in the forefront; today it is very much so,” said Ryan Phillips, product manager of Lee Supply Corp. in Indianapolis. “More and more companies and individuals alike know and understand the importance of having a NATE-certified technician working on their equipment. Having this certification really gets a company’s foot in the door.”

Mutually Benefitting

Like Johnstone Supply and Mingledorff’s, Virginia Air Distributors of Midlothian, Va., was honored by NATE at the HARDI Annual Conference last year. The company received the award for being the HARDI distributor with the most improvement in the number of technician certifications in the past year.

“We offer NATE preparation materials and testing sessions at all of our branches every other month,” said Jack Bartell, director of service and training at Virginia Air Distributors. “We also offer steep discounts to the cost of the exams for loyal customers, along with zero markup to the cost of the exams to all customers.”

Bartell has sat on the NATE Technical Committee for over 10 years and Chris Baker, the president of Virginia Air Distributors, sits on the NATE board



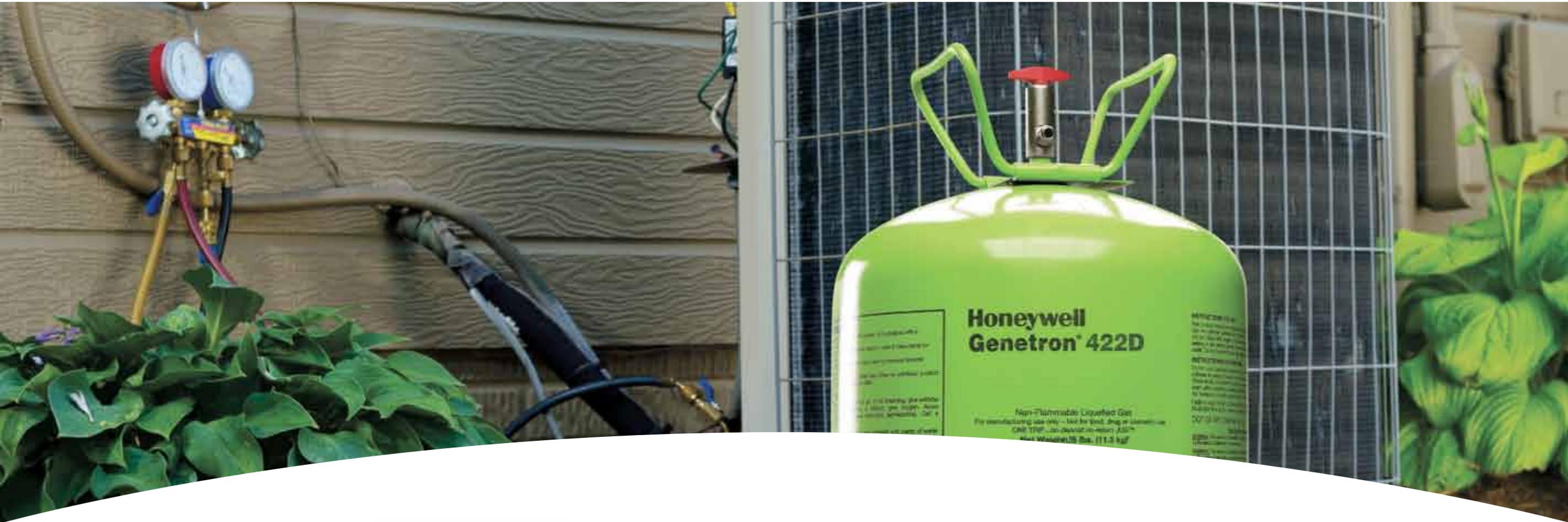
Multiple distributors agree that an increase of NATE certification amongst their customers helped improve brand quality and awareness of the equipment represented on their shelves.

of directors. All technical support staff at Virginia Air Distributors are NATE certified in at least three service level specialties and each display the NATE logo on shirts worn to customer visits.

“Becoming NATE certified provides credibility to a technician’s knowledge, and studies have shown that NATE-certified technicians can earn at higher levels than those without it,” noted Bartell. “As for me, my NATE certification allows me to prove to my technician customers that I don’t just talk the talk, but that I walk the walk when it comes to NATE certification.”

With NATE, many wholesaler-distributors and their contractor customers are finding benefits to certification, along with a well-defined common ground of technical best practices from which each can work and benefit. 

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What's Shakin' with Your HVAC System?

Checking Out a Chiller, a Noisy Pump, and a Couple of Shaky Compressors

By Ron Auvil for *The NEWS* 

Using a vibration tester can enable technicians with no training in vibration measurement and analysis to test pumps, motors, compressors, and other HVAC equipment and get both diagnoses and recommendations for required action on the spot within just a few minutes. I took a tester with me on recent visits to a couple of facilities with critical HVAC applications to learn how it works and to try it out under real-world conditions.

Beating Bad Bearings

My first stop was a late-night visit to the chilled water plant of a local hospital. A reliable supply of chilled water to cool the hospital's emergency rooms and data center is a big priority there, so they test the system along with the emergency backup generator every month. Before we shut down the system for testing, we did a walkthrough and gave the primary chilled water pumps and other equipment a good visual inspection. While we were doing so, one of the hospital technicians told me that one of the 2,000-gallon-per-minute chilled water pumps seemed to



be running a little loud. I agreed, but although an experienced ear is an important troubleshooting tool, this symptom was troublesome but not conclusive. This seemed like a great opportunity to try out the vibration tester for the first time.

It took me about 10 minutes to read the instruction manual and get set up. The first thing

the tester prompted me to do was to enter some basic information about the drive train setup, such as motor horsepower, rpm, and pump layout. I was able to get a lot of this information from the motor nameplate. To measure the running speed (rpm), I plugged in the laser tachometer that comes with the tester

and pointed it at the motor shaft. It gave me a reading of 1,711 rpm, which was automatically entered into the tester.

The Fluke 810 Vibration Tester. (Reproduced with permission, Fluke Corporation.)



Performing a vibration test. (Reproduced with permission, Fluke Corporation.)

After I finished entering the setup information, I attached the tester's vibration sensor while the hospital technician looked on so he would be able to do it in the future. There are two ways that you can attach the three-axis vibration sensor. The first and easiest way is to use the sensor's magnetic mounting. The other way is to epoxy one of the metal mounting pads that come with the tester onto the piece of machinery and attach the sensor to the pad. The second method provides higher quality data, but the data collection takes a little longer. It's the preferred method for attaching the sensor to equipment that you plan to test regularly because once you have a pad attached, you can quickly attach the sensor in the exact same place the next time, making the process as quick, consistent, and accurate as possible.

Since this was our first experience using the vibration tester, we decided to use the sensor's magnetic mount so we could get some readings without delay. The graphical display on the tester showed us the two places where we should attach the sensor to the pump, which we did. After the sensor was attached, it took less than a minute to take a measurement. The tester's onboard diagnostics indicated on the color display that the pump bearings had high wear and recommended that we replace them. Since we were testing the equipment late at night during the minimum usage period (2 a.m.), we scheduled the pump repair for the next day.

When it was time for the repair, the chilled water system was run on the backup pump while the bearings on the main pump were changed. The repair was a routine bearing replacement and went smoothly, which is exactly the kind of repair you want. If the primary pump had gone down, it might have caused the entire chiller plant to shut down, which could have caused overheating computers in the data center to shut down and the operating rooms to lose their cooling, which could be life-threatening.

Chiller Commissioning

During my visit, the hospital was in the process of adding a new 1,250-ton centrifugal chiller to its chiller rotation. When a new machine is being brought online, it's the ideal time to take baseline vibration measurements that you can compare against measurements that you take in the future. Getting good baseline measurements like this for the owner's records is an important step when setting up a centrifugal chiller control system.

I should mention that although we used the vibration tester to take baseline vibration measurements, the tester does not require baseline measurements to evaluate a piece of machinery. Instead, it makes a diagnosis by comparing the vibration measurements that you take against a "synthetic baseline" of vibration information for a machine similar to the one that you are testing. This synthetic baseline is part of the tester's onboard "expert system" which is based on years of vibration analysis of industrial and military equipment.

Since we knew that we would be taking vibration readings on the new chiller again, we decided not to use the sensor's magnetic mount this time and instead chose to epoxy four of the mounting pads included with the tester onto the chiller in the locations indicated in the manual. After we entered the required information (horsepower from the motor nameplate, rpm, use of a variable speed drive, etc.), we attached the vibration sensor and took our readings. The tester indicated that the new chiller was operating perfectly. Later we used the tester's USB port to transfer our vibration readings to a computer for storage.

Compressor Check

One of my favorite sites to visit is a large arena that is home to an NBA team and both professional and college hockey teams. The site also regularly hosts ice skating shows and competitions. Several large reciprocating compressors are used to make the ice for these events. (Interestingly, the ice used for hockey

Common HVAC Applications for Vibration Testers

Air conditioning and cooling systems

- Centrifugal chillers
- Reciprocating chillers
- Chilled water pumps
- Condenser water pumps
- Cooling tower fans
- Fans and pumps on variable speed systems

Air handlers

- Supply fan motors
- Return fan motors
- Fan motors on variable speed systems

Heating systems

- Hot water pumps
- Condensate pumps
- Makeup water pumps
- Pumps on variable speed systems

Product refrigeration

- Refrigerant pumps
- Screw chillers
- Motors on variable speed systems

is kept at a different temperature than the ice used for figure skating. The ice temperature for both, however, is kept to tight tolerances, and before an event starts, compliance is verified by officials using an infrared thermometer.)

When we visited the rink, its cooling system was being checked in preparation for the busy season ahead. As part of the equipment overhaul and checkout, we decided to use the vibration tester to perform a thorough vibration test on the ice system reciprocating compressors. Since I knew we would want to check the equipment again in the future, we epoxied the provided mounting pads onto the proper locations on the compressors.

We decided to check the pump first. On pump startup, we used the tester's laser tachometer to measure the motor rpm and enter the other required data with the keypad, and then took our vibration measurements. Next we did the same for the reciprocating compressors.

The vibration tester generates a graph of the vibration spectra that you can examine right on its color screen. Doing this, we were able to see a truncated waveform for the piston stroke and top dead center timing at the end of the stroke on one of the compressors. Experience indicated that this was caused by some looseness in rod end bearings. We repaired these and then rechecked. All was well.

When we tested a second, identical compressor, the tester indicated some structural looseness. When we re-torqued the hold-down bolts and rechecked, the vibration problem had disappeared.

By measuring and evaluating the vibration data for these two machines, we were able to detect and correct problems that could have caused real problems. 

Reprinted with permission from the Fluke Application Note "What's shakin' with your HVAC system?" For more information, visit www.fluke.com.

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How (and Why) to Find a NATE Technician

The automotive industry recognizes that there's value in having certified technicians. Vehicle owners likewise see the value. Since 1972, the National Institute for Automotive Service Excellence (ASE) has been focused on improving the quality of vehicle repair and service. Now, with more than 350,000 automotive professionals nationwide who have earned ASE certification, it is apparent that this promotion of excellence has been a win-win for the industry and its customers.

North American Technician Excellence (NATE), founded in 1997, is the nation's largest nonprofit certification organization for HVACR technicians. Like ASE, NATE certification testing demonstrates a technician's real-world knowledge of the specific specialty area or areas in which he or she works. The rigorous tests show evidence of HVACR knowledge that the tech brings to the job. The NATE patch indicates to customers that this is a qualified technician.

So how do contractors find a NATE-certified technician? Mike Hayward Jr., vice president/co-owner,



Thermal Services' apprentice program, Thermal U, is based on NATE training and certification as its curriculum. (Photo courtesy of Thermal Services Inc.)

MJ Hayward Mechanical/Electrical Services Inc., West Lebanon, N.H., said, "Our personnel seek NATE-certified service and installation technicians in a variety of avenues — traditional classified advertising; trade schools; numerous online trade, employment, and military sites; and referrals (i.e., technicians, supply houses, customers, etc.)."

Matt Marsiglio, operations manager, Flame Heating, Cooling, Plumbing and Electrical, Warren, Mich., said, "We reach out to our current staff first and foremost for technician hires. Techs know techs and tend to only refer those they are confident that fit our culture. We don't require NATE certification to be hired, but it is in our employee handbook that NATE certification must be achieved in the first year of employment."

Dan Foley, owner and president, Foley Mechanical Inc., Lorton, Va., said, "Almost all of my NATE-certified techs received their certification while employed by my company." They trained and tested while working for Foley Mechanical. "The balance had their certifications when they started here."

Wade Mayfield, president, Thermal Services Inc., Omaha, Neb., said, "Since we are a NATE training facility, we find that techs that are either NATE certified or want to be NATE certified search us out. When you commit to NATE being your certification flagship, you get the reputation which in turn gives you a positive reputation in the technician community."



Is the number of NATE-certified techs growing and are there enough to serve the needs of the industry? Marsiglio said, "We are seeing more techs with certification. There are definitely more certified techs applying now than say five years ago. I do not believe there are enough certified techs for our industry."

Foley responded that "of course" he has difficulty finding certified technicians. He related how he once participated in career day at an area high school. If students were with their parents, the parents guided their children away from Foley's display.

But Foley said the number of certified techs is increasing in his company. "I am requiring all my service techs and lead installers to become NATE certified over the next year. I also recently hired two new techs who were already certified."

Hayward said, "Our trade needs to continue to promote the advantages of working in our industry. Employment is the most challenging item on our agenda. An insufficient number of potential employees (certified or non-certified) surrounds us, and we need to continue to flood all avenues to obtain employees with communication about the benefits of working in this industry."

Mayfield noted, "Since we have aligned what we call 'Thermal U' or Thermal University solely around NATE

Left: "We find that certified technicians are a cut above the rest," said Wade Mayfield, president, Thermal Services Inc., Omaha, Neb. (Photo courtesy of Thermal Services Inc.)

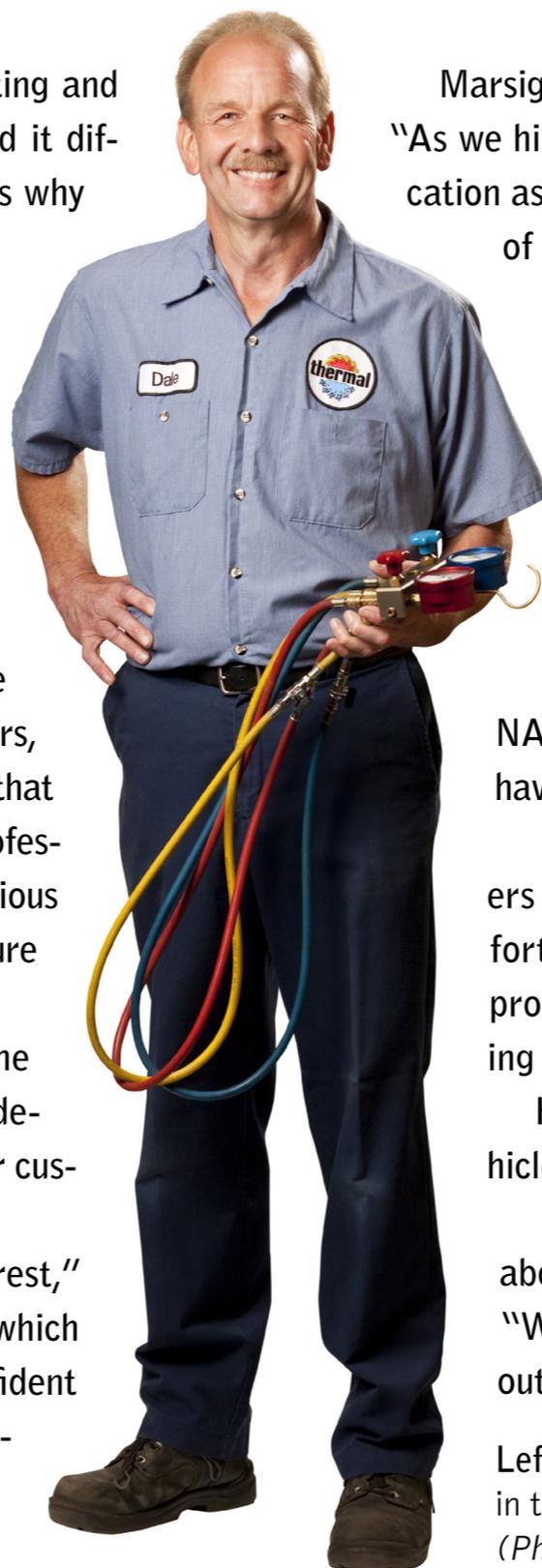
training and certification, we are not as dependent on soliciting and hiring certified technicians. With that being said, we still find it difficult hiring techs at the pace at which we are growing. This is why having our own NATE training program is very important."

Why hire a NATE-certified technician? Marsiglio remarked, "NATE-certified techs show a different level of commitment to the industry. It seems they look at it as a career rather than just a job."

"A NATE-certified tech has proven a level of competence and proficiency that is certified by rigorous testing procedures," stated Foley. "I have had techs make the comment, 'I have been doing this for 25 years. I don't need a test to tell me what I know!' Imagine if professional engineers, pilots, doctors, accountants, or any other professional, for that matter, had that opinion. NATE certification is a way of raising the level of professionalism in our industry. It lets the consumer know we are serious about what we do and are taking the necessary steps to endure that the technician we send into their homes is competent."

Hayward declared, "NATE-certified technicians are the cream of the crop and honestly appreciate the industry and desire to better their knowledge to better serve themselves, their customers, and their employers."

"We find that certified technicians are a cut above the rest," said Mayfield. "NATE-certified technicians bring confidence which translates to competence in the eyes of the customer. A confident technician will be more comfortable offering professional solutions to customers, which again shows the technician's competence which is a reflection of the company."



Marsiglio related that currently his company is 95 percent certified. "As we hire and promote new techs, we begin to train for NATE certification as it is a requirement to become NATE certified in the first year of employment as a technician."

Foley said his business is 60 percent NATE certified and he expects to become 100 percent NATE certified within a year.

Hayward said, "Our firm's technical employment is at least 75 percent NATE certified and we're working towards becoming 100 percent NATE certified."

"As long as our company is growing, we will have non-certified techs," said Mayfield. However, he pointed out that his firm's apprentice program, Thermal U, is based on NATE training and certification as its curriculum. "We currently have 35-plus techs that hold NATE certification."

As for whether his company promotes that it offers customers NATE-certified technicians, Marsiglio said, "Yes, our comfort consultants will share a NATE trifold with customers and promote the certification and explain the difference in not having the certification."

Hayward commented, "Yes, we do — via online, company vehicle decals, and direct mail."

"Our technicians and our salespeople talk to our customers about the importance of being NATE certified," Mayfield said. "We also promote it on our website and in our company handouts/sales book." 

Left: NATE certification shows that the technician was willing to put in the time and effort necessary to demonstrate his professionalism. (Photo courtesy of Thermal Services Inc.)



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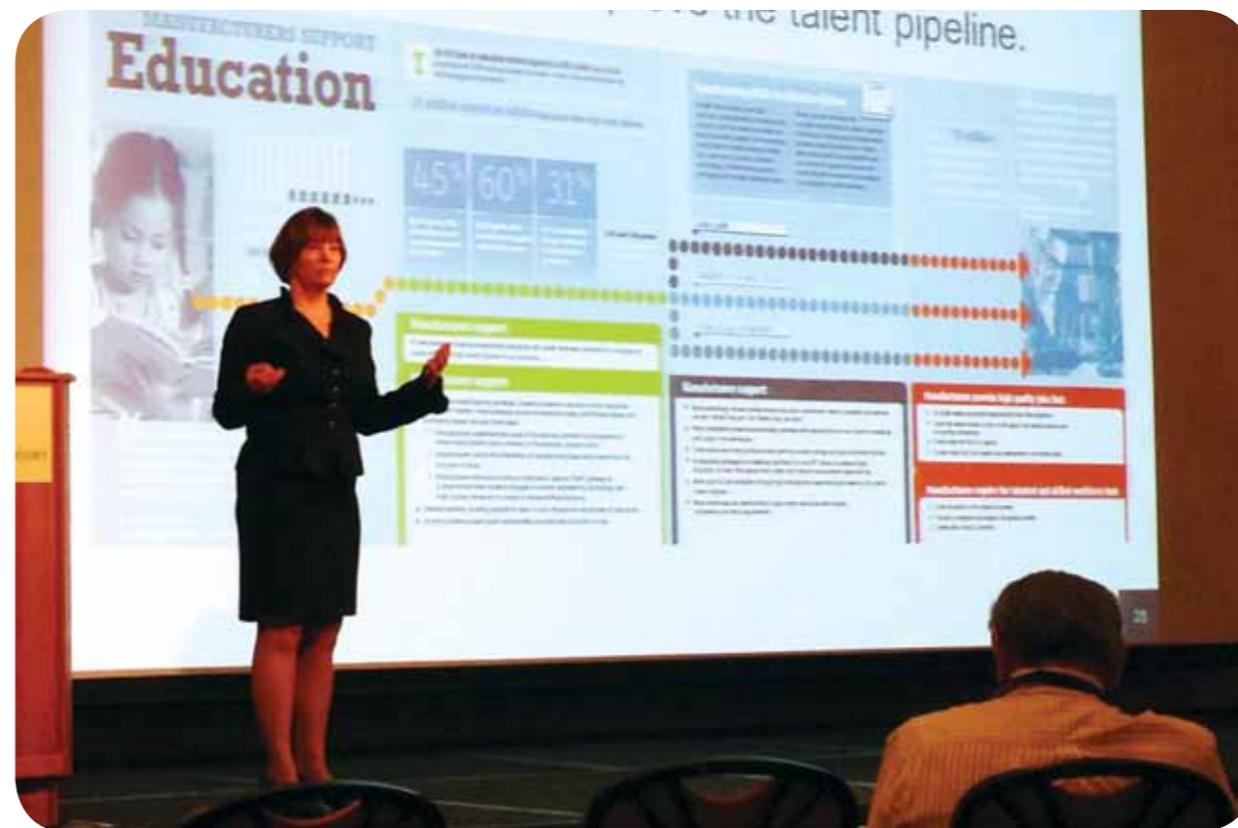
Educators Discuss Need for New Talent at Colorado Conference

More than 130 industry educators and professionals recently gathered at the base of the picturesque Cheyenne Mountain in Colorado Springs, Colo., for the 2013 HVACR & Mechanical Conference for Education Professionals. But they were not there to admire the scenery or take in a round of golf — they were there to learn from each other and discuss ways to shape the future of the industry. Over three days, conference-goers attended classes on subjects like how to teach hydrocarbons safety, how to teach commercial HVACR without a commercial lab, and how to most effectively instruct today's generation of HVACR students. But the much broader underlying theme of the conference was the understanding that the industry, especially educators, must do something to attract new talent.

Bye-Bye, Boomers

As members of the baby boomer generation transition into retirement, more and more qualified individuals are needed to take their places in the workforce. Currently, the number of jobs opening up in the industry far outpaces the number of workers available to fill them.

Jennifer McNelly, president of the Manufacturing Institute, the nonprofit affiliate of the National Association of Manufacturers, highlighted the need for new talent in her keynote speech. "Eighty-two percent of our nation's manufacturers can't find qualified workers — that equates to 600,000 open



Jennifer McNelly, president of the Manufacturing Institute, the non-profit affiliate of the National Association of Manufacturers (NAM), highlighted the need for new talent in her keynote address at the HVACR & Mechanical Conference for Education Professionals in Colorado Springs, Colo.

jobs," McNelly said. "Manufacturers need a highly skilled workforce."

But the shortage of talent does not only apply to manufacturing jobs. In a recent survey conducted by Fluke Corp. of more than 1,600 HVAC educa-

tors, professionals, and employers, an astounding 85 percent of employers reported it was difficult or very difficult to find entry-level technicians with acceptable skills.

“We have a tremendous work shortage coming up,” said Warren Lupson, director of education for the Air-Conditioning, Heating & Refrigeration Institute (AHRI), during his keynote address. “And that is on top of the problem that already exists.”

Don Frenberg, executive director, HVACR Workforce Development, believes the problem is that the industry is simply not attracting students as it should.

“We haven’t, as an industry, done a very good job of getting the word out about our industry, but the potential is there,” Frenberg told conference attendees during the closing keynote address. “Our goal is to go out to the high schools, middle schools, and junior highs, talk to those students and counselors, and get the word out to the parents about our industry and the careers that are available.”

Fixing a Broken Image

McNelly said students simply are not drawn to the industry in the same way they are drawn to other careers, in part because secondary schools often perpetuate that a four-year degree is more useful than an associate’s degree or vocational training.



Left: Warren Lupson, director of education for the Air-Conditioning, Heating & Refrigeration Institute (AHRI), talks about the upcoming shortage of industry workers during the HVACR & Mechanical Conference for Education Professionals in Colorado Springs, Colo. Above: More than 130 industry educators and professionals attended the conference.

“A four-year degree no longer defines success, but for many families, it’s not even a question that their children will go to college,” McNelly said. “However, individuals graduating with technical degrees are making more than four-year baccalaureate graduates.”

The disparity between the perception of industry jobs and the reality is so significant, she added, that only three out of 10 parents today would encourage their own children to pursue a career in manufacturing.

“The parents say, Let’s make more manufacturing jobs, but let’s not encourage our kids to pursue them,” McNelly said. “The supply chain of workers is broken, and we have to stop talking about it and act on it.”

Fixing that supply chain, however, will take time and a coordinated effort from businesses, industry organizations, and educators.



Educators and trainers listen to a keynote presentation at the HVACR & Mechanical Conference for Education Professionals in Colorado Springs, Colo.

“It’s really about parents, teachers, and counselors, and it’s about the people who influence parents,” McNelly said. “How do we tap into that market?”

Putting on Make-Up

One of the most effective ways to cultivate interest in HVACR industry jobs is by getting into the schools and talking to students, parents, and counselors about the benefits of working in the HVAC industry — something McNelly said is not being done nearly as well or as often as it should be.

“This is a ground game in public relations,” McNelly said, adding that many small- to medium-sized manufacturing businesses, which comprise 80 percent of the manufacturing industry, often do not have the means to em-

ploy individuals who are dedicated to acquiring new talent. “Education in this country is, by nature, driven at a local level,” she added.

In an effort to change public perception of industry jobs, McNelly said the Manufacturing Institute established the industry’s first-ever national education council. “We started listening to educators,” she said. “We assembled representation from the K-12 system, community colleges, technical colleges, and four-year institutions.”

The Manufacturing Institute recently organized the first Manufacturing Day, in which 250 manufacturers participated. “Part of our responsibility is to inspire the next generation, to help them understand the opportunities,” McNelly said.

McNelly isn’t alone in the fight to allure the next generation into the HVACR industry. Greg Josefchuk, strategic programs leader for Trane/Ingersoll Rand, said his company is also doing its part to attract new talent.

“We’ve decided as a company to get into the game and really support career and technical education,” Josefchuk said. “This is a complex issue, and it really has to do with the prosperity of our country.”

Lupson also appealed to educators at the conference to do their parts to attract new students, too. “The people who come to these types of conferences, we need your help connecting with your administrators. We need your help getting the students, parents, and everybody else involved in this industry.”

“We need to own this image problem and start by changing it one school at a time, one parent at a time, one child at a time,” McNelly said. “We need to promote a positive image, we need to stand as policy leaders when it is questioned if technical education needs to be funded — and the answer is yes. We need to talk to our peers. In the end, you have to be a champion in your community.”

Lupson stressed that time is of the essence.

“We can’t afford not to do something now.” Lupson agreed. “The future of our industry depends on it. It depends on us.” 

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John Lanier Joins NATE as Chief Operating Officer

The Air-Conditioning, Heating, and Refrigeration Institute (AHRI) and North American Technician Excellence (NATE) recently announced the appointment of John Lanier as NATE's new chief operating officer (COO). Lanier has held a number of executive positions, including senior vice president of operations for the National Federation of Independent Businesses (NFIB), which has more than 400,000 members.

"Throughout my career, I have had the opportunity to work with a variety of teams with the ultimate goal of delighting customers," Lanier said. "To that end, I recognize the need for not only a high attention to detail, but also the value of strong strategic planning and execution."

Lanier, who is already settling into his new position, said he will continue to work "to ensure growth and progress at NATE and further its role in certifying the most knowledgeable, well-trained, and highly experienced technicians in the HVACR industry."



John Lanier was recently named Chief Operating Officer for North American Technician Excellence.



Coming to NATE

Lanier grew up in a small suburb of Minneapolis and earned his bachelor's degree in economics from the University of Minnesota. He also completed an executive education program at Kellogg School of Management, Evanston, Ill., and he is currently working on his MBA.

His educational expertise, coupled with his real-world experience running organizations similar to NATE, has helped prepare him for his current position, he said.

"Economics is the study of the interaction between production, distribution, and the consumption of goods and services," Lanier explained. "As NATE plays an integral role in the HVACR community with

manufacturers, distributors, contractors, and consumers, it will be important to leverage the relationships and synergies between all of these players.”

Don Frendberg, chairman, NATE, who performed many of the COO duties prior to Lanier’s appointment, agreed that Lanier’s educational and professional background makes him a valuable addition to the organization.

“He’s a really talented individual,” Frendberg said. “His experience and excellent background in business, including HVACR sales, makes him a great fit for where NATE is heading in the future.”

AHRI president and CEO Stephen Yurek also welcomed Lanier to the organization’s ranks in a June 14 press release.

“We are very pleased to have someone with John’s experience and drive taking the reins at NATE,” Yurek said. “I know that our member companies and others in the industry are eager to work with John to ensure growth and progress at NATE at a critical juncture in its history.”

The Future of NATE

As COO, Lanier is already well aware of the issues facing NATE and the industry in general, including the looming shortage of qualified HVAC technicians.

“We’ve all seen the statistics that the demand for qualified technicians is going to outpace the supply in the next few years,” he said, adding that “technology will continue to impact how equipment is repaired and serviced, and greater technical education will be required to enter the industry.”

Luckily, he said, NATE has a plan to try to close the gap between the number

of technicians who are qualified and the number of jobs that need to be filled.

“We plan to increase our outreach to training organizations and employers to help more technicians find the training they need to enter the industry, seek and maintain certification, and become more marketable to employers,” he said. “NATE has begun to administer the Industry Competency Exams, or ICE exams, to measure basic competency and certification for entry-level technicians with one year or less of experience. We see a great opportunity here to help define a career path for technicians from ICE certification to NATE certification and beyond for those interested in HVACR.”

Frendberg agreed that getting more technicians certified — and recertified — is NATE’s priority.

“Our goal is to increase the number of technicians — it’s not to sell more exams,” Frendberg said. “Our technicians recertify every five years. How do we make it so it’s not a burden, but something they want to do?”

Other goals, Lanier said, include making NATE testing and certification more accessible as well as increasing consumer awareness. “We must continue to work to advance NATE’s position to the HVACR industry and consumers by ensuring the certification program is relevant and accessible, increasing industry and consumer awareness of the benefits of NATE-certified technicians, and advocating for NATE with relevant government agencies,” Lanier said.

He added, “I look forward to working with our team here at NATE as we execute an effective plan to serve the HVACR industry and homeowners.” 

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NATE Certification Demonstrates Technician Competence

The North American Technician Excellence (NATE) badge is more than just uniform flair. The emblem signifies HVACR competence and proficiency widely accepted across the country. The technician credential is so highly regarded, that contractors nationwide are not only encouraging their employees obtain certification; they are requiring it.

The NATE Advantage

NATE is an independent, third-party nonprofit certification body for HVACR technicians. The organization's certification tests represent real-world working knowledge of HVACR systems across various specialty areas including air conditioning, gas furnaces, commercial refrigeration, and more.

Each exam is crafted by a technical committee comprised of contractors, educators, manufacturers, and utility personnel, and focuses on specific knowledge areas of technician expertise.

NATE certification is growing in popularity for both consumers and contractors, as many of the industry's leading companies now consider NATE certification a prerequisite for employment.

Individuals interested in working for Bel Red Energy Solutions, Mukilteo, Wash., must include some form of NATE certification on his or her résumés.

"We require NATE certification because it provides many benefits. It helps us to establish authority, trust, and confidence with the customer and sets us



Homeowners know they're in good hands when they hire a contractor who hires North American Technician Excellence (NATE)-certified technicians.



Technicians at CroppMetcalf Inc., Fairfax, Va., are required to obtain North American Technician Excellence (NATE) certification. Management insists that customers recognize NATE-certified employees as industry professionals.

apart from other contractors,” said Adam Gloss, vice president, Bel Red Energy Solutions. “It also provides tangible goals and milestones for technicians as part of their career progression and helps to build technician confidence and pride.”

Training is a part of the mission at CroppMetcalf Inc., Fairfax, Va., and part of that training includes mandatory NATE certification.

“We strongly believe in training our coworkers,” said Mitch Cropp, president, CroppMetcalf. “We believe that the more a technician knows, the more valuable he is to the company and our customers. Customers appreciate the value of a technician’s training and certification and are more apt to recognize these individuals as industry professionals.”



The leaders at Bel Red Energy Solutions, Mukilteo, Wash., require North American Technician Excellence (NATE) certification because it establishes authority, trust, and confidence with the customer.

Paycheck Perks

Isaac Heating & Air Conditioning, Rochester, N.Y., has 86 NATE-certified technicians across 539 specialties, making them the employer with the most NATE-certified technicians nationwide. Their entire roster of senior technicians is NATE certified in at least one specialty area and newer employees are quick to acknowledge the role NATE certification plays in position and salary advancement.

“Our salary review process is very objective, taking into account many things including NATE certifications,” said Greg Goater, director of training and safety, Isaac Heating & Air Conditioning. “In most cases, an initial NATE certification adds a 5 percent increase at review time. Subsequent specialty

certifications gain an employee an additional 3 percent.”

Some companies put such stock in the NATE brand that they are willing to pay for their technicians to obtain the credentials.

“We encourage NATE certification and will pay the fee for techs who pass the test,” said Rich Callahan, service manager, Air Services Heating and Air Conditioning, Springfield, Mo. “We’ve found that techs who are NATE certified seem to act more professional than those who are not, and we give techs a raise once they gain certification.”

Contractor Tested, Consumer Approved

While some in the HVACR industry insists that NATE certification is primarily an inner-circle flag to fly, Anthony Crowe, owner, Grissom Brother Service Co., Birmingham, Ala., said knowledge of NATE is becoming more common at the consumer level.

“Being primarily a residential company, we see a lot of younger clients who have researched our industry when needing service. I’ve been repeatedly asked if our techs are NATE certified,” he said. “Techs that go through the program, especially the younger ones, emerge with much more confidence. I find that certified techs are more apt to educate clients about what NATE is, and how it differentiates them from other, noncertified techs.”

Gloss agreed that the NATE branding has helped funnel prospective clients into their office.

“Familiarity of NATE certification among consumers is spreading, and even though it is not prevalent yet, we do get customers who call us because we are a NATE Quality Circle contractor,” he said. “We’ve even had an on-line review from a retrofit installation customer who wrote that they hired us because we were NATE certified, and, once we were done, they emphasized how happy they were with this decision.”

The Preferred Choice

Gloss said NATE continues to offer superior services that no other organization supplies. “NATE is the best certification we have seen for HVACR service technicians and installers,” he said. “It does a good job recognizing a high level of technical knowledge and experience.”

According to Goater, a NATE-certified technician is well-rounded in the knowledge of repairing HVACR equipment, as not only do they have the knowledge, but they know how to apply it.

“A rising tide raises all boats,” he said. “Not only do we encourage other contractors to promote NATE, but Isaac Heating makes me available to the

local ACCA chapter to teach review classes for other contractors in preparation for the NATE exams the chapter offers.

“The only other certifications that mean anything at all to us is perhaps the RSES certifications. NATE is our standard, and we see it as the industry standard.”

Amongst all available certification opportunities, Cropp identified NATE as simply the best. “This program was put together by some of the most talented industry leaders from day one and has continued to be improved upon,” he said. “When you earn your patch, it has meaning and you become very proud to stand out in front of your peers knowing that I’m one of the best.” 



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NATE Aims to Raise Name Recognition

NATE is celebrating its 16th anniversary this year. During that time it has built up a brand that is synonymous with quality HVAC technicians. And while NATE has great name recognition within the industry, a few years back it realized that it needed to get its message out to a broader audience.

In 2011, NATE launched a consumer awareness campaign that focuses on educating consumers about NATE via targeted advertising and a strategic public relations campaign to generate media coverage about NATE.

Through ongoing media outreach, the NATE message is appearing in an increasing number of newspapers, magazines, and radio and television news outlets to inform homeowners that hiring NATE-certified technicians offers quality assurance they can trust. NATE has also previously placed national network radio advertisements on a mix of news, sports, and entertainment programs, and partnered with industry manufacturers to include NATE in their own ads to help spread the word about the quality assurance offered by NATE certification.

In spring 2013, NATE started an ad campaign highlighting NATE certification and the NATE contractor website, www.hvacradvice.com on Yelp.com, the popular consumer website used to find and review local businesses. In January 2013, Yelp.com reached an all-time high of 100 million unique visitors and the "Home Services" category (including HVACR providers) is one of the site's top search categories.



Investment

NATE's reason for investing in such a program was pretty evident — name recognition.

"The overall goal of this program is to educate homeowners about NATE certification; not only is this effort important in terms of consumer value, but it also ultimately improves the business of those contractors who demonstrate their dedication to superior installation and service. As an industry advocate, NATE aims to promote the HVACR industry's knowledge and commitment to excellence, which is exemplified by maintaining certification," said Valerie Briggs, NATE director, marketing and business development.

NATE aims to increase consumer awareness of this value offered by certification, while simultaneously elevating those contractors who demonstrate their commitment to excellence by demanding NATE certification. To further assist contractors in capitalizing on these upcoming efforts and connecting to consumers seeking NATE-certified technicians, the organization provided NATE logos, print, and online resources for use in contractors' advertising. Qualified contractors can access the logos and print information at the MyNATE portal at www.mynate.org.

NATE spent a lot of time researching the market to figure out what was the most bang for their buck in attempting to maintain a presence with homeowners. In today's age of multi-media, NATE

researched newspapers, magazines, radio, television, and online formats.

“To effectively market, we employ tools of segmentation, targeting, and positioning to determine the most appropriate audience, to understand the needs of that audience, and to demonstrate the value delivered by your product,” Briggs said. “We’re looking to educate those consumers who are perhaps less price sensitive than others and who more concerned with finding a contractor whose technicians will offer knowledgeable advice, great service, and who get the job done right, resulting in fewer callbacks.”

Briggs was quick to point out that with the increasing awareness that

NATE is developing among the public, it is important for contractors to promote their technicians getting NATE certified.

“As an increasing number of homeowners learn about NATE and visit **HVACRAdvice.com** to find a qualified local contractor, it’s more important than ever for contractors to insist on NATE-certified technicians and to include their company information on the site’s online locator. Campaigns like these extend the reach of our message to a greater number of homeowners, educating them about NATE certification and helping to connect them with contractors who are dedicated to superior installation and service,” Briggs said. 

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NATE Helps Contractors Showcase their Credentials to Customers

By Valerie Briggs for *The NEWS*



With media coverage surrounding the risks of hiring dishonest or unqualified service professionals, more consumers than ever are seeking contractors with credentials they can trust.

One easy and effective way HVACR contractors can differentiate themselves from the competition is through NATE certification. By employing technicians who have proven their skills and knowledge by passing the stringent NATE exam, contractors can illustrate their competence and, therefore, ensure customer confidence. NATE has developed multiple ways to help contractors leverage NATE certification as a point of differentiation among competitors and communicate the benefits to customers.

Consumer Contractor Connection

NATE offers the Consumer Contractor Connection (C3) program to promote to consumers those HVACR contractors who value NATE-certified technicians. Whether a contractor is a one-person shop or has NATE-certified



technicians in multiple locations, NATE's C3 program is the best way to let customers know they employ NATE-certified technicians.

Once 50 percent of technicians have passed the NATE exams, contractors may register the company information and technician NATE ID numbers. Contractors with at least 80 percent of their technicians NATE certified are designated as Quality Circle Contractors. As a NATE C3 Contractor, the business is listed on the NATE Consumer Contractor Connection website at www.hvacradvice.com. Over 5,000 consumers view and use the NATE contractor site every month. For

more information, visit www.natex.org/C3signup.

Marketing Materials

Available for download at www.mynate.org is a consumer-focused brochure that explains what NATE certification is and how it offers customers peace-of-mind with skilled, knowledgeable professionals that can deliver the best results for their HVACR system. The two-sided brochure is designed for professional



NATE-CERTIFIED TECHNICIANS CAN KEEP YOUR A/C SYSTEM RUNNING AT PEAK EFFICIENCY.
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hvacradvice.com

printing and includes instructions for customizing with the contractor's company information and working with a local printer. NATE also developed a one-page version of the customizable piece that can be quickly and easily printed from a standard printer. In addition to print materials, NATE developed an array of new online assets for contractors to use on their sites. These materials make it simple for the contractor to explain how NATE certification sets their company apart and offers the customer peace-of-mind that they have found a trained, reputable professional. From online graphics to web copy and images, the new online assets are available in multiple sizes and specs to easily fit any contractor's website. The online materials are currently available at **MyNATE** — simply login and follow the instructions to access the files of your choice.

NATE Logos

Various NATE logos are available at www.mynate.org for contractors to download and add to websites and marketing materials. Please keep in mind that the NATE logo is a visual representation of The NATE brand, as a certification organization, proper usage is key to increasing awareness for what they do: certifying the finest in HVACR. Therefore you must adhere to the NATE Logo Identity Guidelines available at www.natex.org.

Multiple trade audiences use the NATE logo from contractors to manufacturers to training partners, testing facilities, and utility companies. In order to best support each NATE industry partner, individual logos have been created with targeted messaging that supports each organization.

Available for download at www.mynate.org is a consumer-focused brochure that explains what NATE certification is and how it offers customers peace-of-mind with skilled, knowledgeable professionals that can deliver the best results for their HVACR system.

Contractors are required to keep at least one NATE-certified technician employed for continued use of the NATE logo. If a contractor no longer has any NATE-certified technicians due to certification expiration or technician leaving employment, then the contractor must immediately stop using the NATE logo. The NATE-certified logos should not be used by contractors since NATE does not certify contractors.

NATE Store

The NATE store is available online and offers for sale NATE patches and chevrons, banners, lanyards, apparel, decals, and accessories for technicians

and contractors to demonstrate their pride in NATE certification. Currently certified technicians can also order replacement wallet cards and certificates as needed. If you're interested in suggesting an item for the store, please contact Valerie Briggs at vbriggs@natex.org.

Showcase Your NATE

NATE wants to encourage and recognize those contractors who are effectively marketing NATE-certified technicians. In 2011, NATE hosted the "Showcase Your NATE" Sweepstakes to reward contractors that actively promote their NATE-certified technicians to highlight their expertise and increase their business. To participate, contractors were invited to submit descriptions and pictures of the various ways that they use NATE to build consumer confidence and attract new customers. With each submission, the contractor was entered into a regular

drawing for a chance to win \$1,000 in free local advertising and/or NATE promotional materials. Many entries were featured online, offering the contractor additional exposure and recognition for their commitment to quality work.

The four winning contractors were Bovard Heating & Cooling from Altoona, Pa.; Parrish Services Manassas, Va.; Bay Area Air Conditioning & Heating Crystal River, Fla.; and BNB Mechanical in Rancho Cucamonga, Calif.

NATE plans to host more showcase opportunities in the future, so stay tuned.

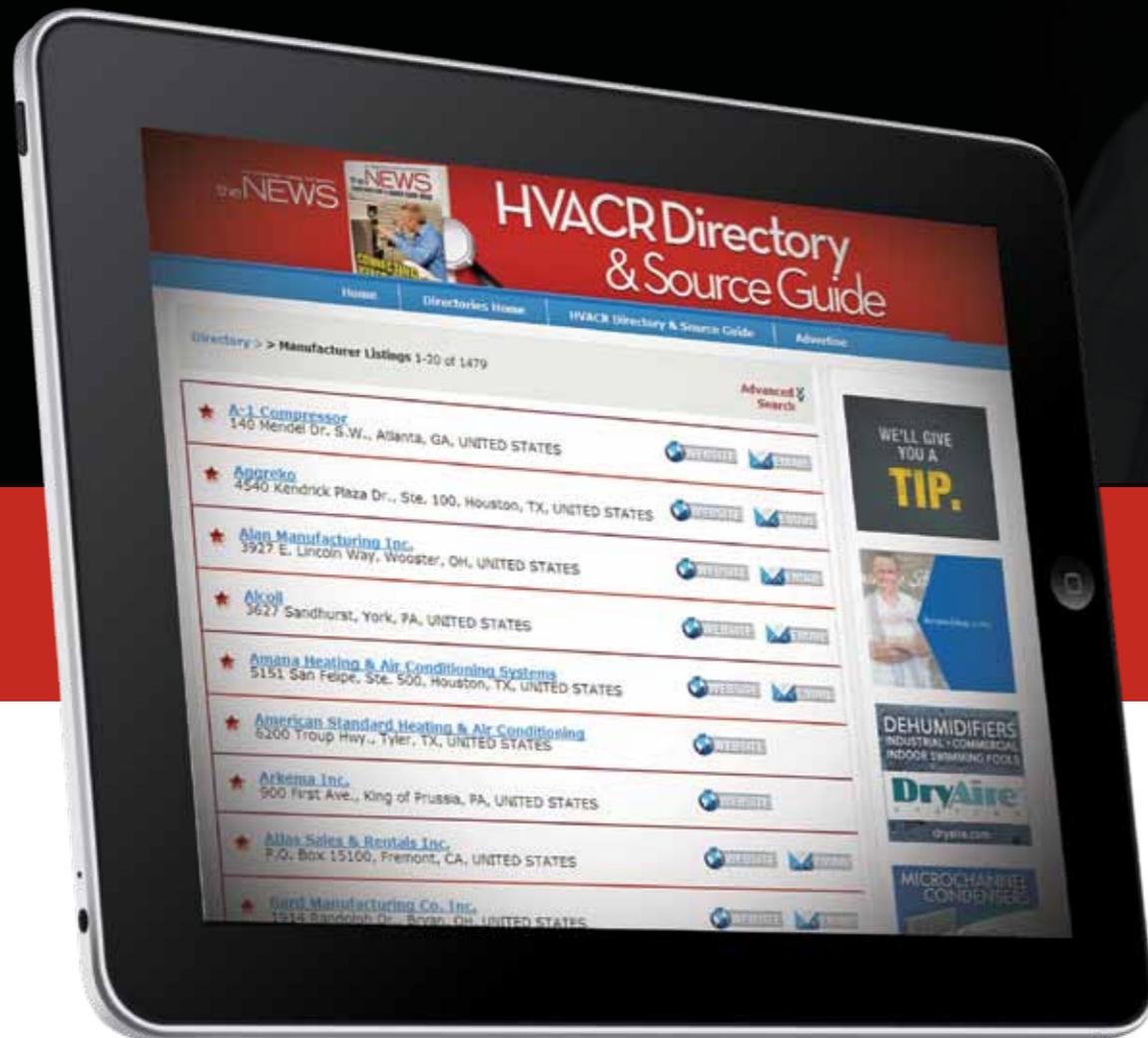
For more information about NATE and access to promotional materials for qualified contractors, visit www.natex.org.

About the Author:

Valerie Briggs is the director of marketing and business development for NATE.

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NATE Interview

(Editor's Note: NATE Director of marketing and business development recently sat down with NEWS editor Jen Anesi to discuss everything NATE.)

JEN ANESI: Hello, listeners, and welcome to our NEWSmakers podcast! This is Jen Anesi, legislation editor for *The ACHR NEWS*, and today we're sitting down with Valerie Briggs, director of marketing and business development for North American Technician Excellence, better known as NATE.



Valerie Briggs

In this podcast, we'll talk to Valerie about the state of NATE, what's new with NATE, and why NATE testing and certification is important to the HVACR industry. Good morning, Valerie, and thanks for being part of this week's ACHR News podcast!

VALERIE BRIGGS: Thank you, Jen, for having me. We always welcome the opportunity to talk about NATE.

JEN ANESI: Great! Now, would you mind giving our listeners a little background info on NATE?



VALERIE BRIGGS: Absolutely. North American Technician Excellence, or NATE as we're commonly known, is the largest in the nation of non-profit certification organization for HVACR technicians. Our certification tests represent real-world, working knowledge of HVACR systems developed by a committee of industry experts nationwide. And our exams represent HVACR topics pertinent to contractors, educators, manufacturers, and utilities alike. Our tests are meant to be rigorous, multiple-choice, knowledge-based tests that validate a technician's knowledge, and candidates may earn Installation and/or Service certification in one or more of 11 specialty areas, including air conditioning, air distribution, air-to-air heat pumps, gas and oil furnaces, hydronics gas and oil, light commercial and commercial refrigeration, senior level efficiency analyst position, and in-ground source heat pump installation via a partnership we have with the International Ground Source Heat Pump Association.

JEN ANESI: Alright, well thank you for that overview — that’s a lot of important certifications there.

VALERIE BRIGGS: Absolutely.

JEN ANESI: So, tell me, now, what’s new with NATE lately?

VALERIE BRIGGS: We have lots of new and exciting things happening. Most importantly, we have new staff on board, including myself, as our new director of marketing and business development, and we have a new director of certification, Denny Smith, who’s been on board for almost a year now. He’s working to finalize a revised Core examination that will combine the currently individual service and installation core exams into a single 75-question Core exam. Our Hydronics and Refrigeration specialty exams are being updated based on a job analysis of the changes in the industry. And soon, we’re going to offer the Core exam, as well as our air conditioning service, heat pump service, and gas furnace service specialty exams in Spanish. For the contractors who employ NATE-certified technicians, we’re expanding our value-added benefits to them, including new print and online marketing materials and promotion of their businesses to consumers with advertising on sites like Yelp.com. Our goal is to always be relevant and to support the technicians who work so hard for NATE certification and the contractors who see the value in employing NATE-certified techs.

JEN ANESI: That’s a lot of new stuff! Welcome to NATE. Now, when did you start?

VALERIE BRIGGS: Thank you very much for the welcome. I started in December of 2012, so I hit the ground running, pretty-much, but it’s been great.

JEN ANESI: You’re welcome! So, NATE is owned, operated, funded, and governed by the HVACR industry. In your own words, why do you think NATE is so important to the industry?

VALERIE BRIGGS: I think NATE is so important, Jen, to the industry because of the value it brings to the various stakeholders of the industry. Contractors prefer NATE-certified technicians because they remain in the industry longer, they know how to do the job right the first time, and they’re more productive than non-certified technicians, research has shown. Manufacturers and distributors know that NATE certification encourages proper installation and service, which means fewer warranty returns and, ultimately, a better bottom line for them. Utilities appreciate NATE certification’s focus on correct installation and service of the sophisticated HVACR equipment, which ultimately saves energy and money when operating at peak efficiency. Industry educators and trainers benefit from NATE certification’s uniform testing standard. But most of all, of course, the technicians who earn NATE certification find they are more preferred among customers, they require fewer callbacks because they get the job right the first time, and they tend to generate more income for their employers. So, thus, on average, they earn higher wages, and they demonstrate greater value to employers than non-certified technicians. So that makes them more marketable in the industry.

JEN ANESI: OK, so if research has shown that being NATE certified has all these wonderful benefits, why do you think all HVACR schools – I mean, do they all offer NATE testing? And if they don’t, why not? Why wouldn’t they?

VALERIE BRIGGS: Well, right now, it’s on a voluntary basis, so an organization can apply to be a NATE Testing Organization. So, we have hundreds

of HVACR schools that participate and offer NATE testing, but we also have manufacturers, wholesalers and distributors, utilities, association partners, and trade association chapters that offer testing, as well. Again, it's a voluntary thing, but we're encouraging more and more organizations to get involved. Those who are interested can simply go to our website at natex.org and review the testing organization proctor and policy procedure guidelines and then complete a testing organization application online.

JEN ANESI: In a perfect world, should all HVACR students be NATE certified, either by the time they finish their respective programs or maybe soon thereafter? And on top of NATE certification, what other kinds of certification should they have by the time they're leaving school?

VALERIE BRIGGS: Well, the NATE tests are designed to assess a candidate's applied knowledge in their field. There are currently no formal educational requirements for certification. However, we do strongly suggest that examinees have some type of formal training provided either by an employer, a technical school, or other educational institution. We do recommend that candidates for NATE certification have some work experience as well as some experience with equipment in their specialty. We recommend maybe one year or more for those who are looking for installation certification, two years of experience for those taking the service technician test, and five years of experience for the senior-level technician test. Soon, we're going to be administering the Industry Competency Exams, or ICE exams, that were formerly provided by AHRI. These exams will measure basic competency for entry-level technicians with a year or less of experience. Right now, more than 300 schools nationwide require student participation in at least one of those ICE exams in order to graduate.

JEN ANESI: That's good; that's a step forward. So, what are some of the challenges that NATE is facing lately?

VALERIE BRIGGS: Well, as always, we must continue to work to increase HVACR industry awareness of the benefits of NATE-certified technicians. We have to ensure that the NATE recertification program is relevant and accessible to those who are interested. We must increase the availability of testing sessions for those who want to become certified — as I just mentioned, we're more actively recruiting to have more organizations come on board as approved testing providers. We're working to increase consumer awareness, as always, of the value of NATE certification and using NATE-certified techs for home services. And we must continue to advocate for NATE with the relevant government agencies.

JEN ANESI: OK, so how are you going to do all of that? How are you going to handle all of those challenges?

VALERIE BRIGGS: We're working on them a little bit at a time, but it's an ongoing effort, absolutely. As I mentioned, our upcoming changes to the Core and some of our specialty exams are going to represent our goal to ensure that NATE tests are always relevant, available, and accessible based on changes in the industry and the workforce. We're building consumer awareness by promoting and encouraging our contractor involvement with our Consumer Contractor Connection program and on our consumer site at HVACRadvice.com. And we're always working to increase awareness of NATE via various partnerships and our promotion and outreach to industry stakeholders and the government. And we always value the opportunities to talk about NATE with the industry, like on this podcast today.

JEN ANESI: OK. Do you want to say that website one more time, just so people get that?

VALERIE BRIGGS: Absolutely! It's www.HVACRadvice.com.

JEN ANESI: Perfect! So, now, another question for you here. Fluke recently surveyed more than 1,600 industry professionals, educators, and employers, and they found out that 85 percent of employers found it "difficult or very difficult" to find entry-level workers that had acceptable skills. So, do you think that sounds about right, in your estimation, and what do you think can be done to close that gap?

VALERIE BRIGGS: Well, here at NATE, we see the results of this survey as presenting a great opportunity. As I mentioned, NATE will soon begin administering the ICE Exams to measure basic competency for those entry-level technicians. And we plan to promote those exams and encourage more entry-level technicians, and the organizations that serve them, to become involved. The Fluke survey also noted that 38 percent of employers said candidates lacked an applicable degree or certification, and for us, this represents a prime opportunity where NATE certification is concerned. Now, while we do not offer training from NATE, we do recommend that those seeking certification obtain some formal training provided by an employer or a technical school other educational institution. We have links to those resources on our

website. So, my plan is to increase our outreach to those training organizations and to employers to help to connect the dots and help more technicians to find the training they need to seek and maintain NATE certification and, thus, become more marketable to those employers.

JEN ANESI: That sounds like a good plan. Is there anything else you'd like to add before we wrap up this podcast?

VALERIE BRIGGS: Sure! I mean, just for anyone who's interested in learning more about NATE and its benefits to the various industry stakeholders, as well as obviously to the technicians who earn the certification, we invite you to visit our website, www.natex.org, or give us a call at 877-420-NATE (6283).

JEN ANESI: Perfect! Thank you very much today, Valerie. I really appreciate it.

VALERIE BRIGGS: Thank you, again, for having me. I really appreciate it.

JEN ANESI: We hope you found our conversation with Valerie informative, interesting, and relevant. For more HVACR industry news, please visit our website at achrnews.com. And don't forget, you can download all of our past NEWSmakers podcasts for free in the iTunes store. This is Jen Anesi reporting for *The ACHR NEWS*. Thanks for listening, and have a great day! 

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