



ASHRAE 2024 Workforce Development Summit

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Summary Report and Roadmap
ashrae.org/president

The ASHRAE Workforce Development Summit occurred on October 20, 2024, in New York City. The invitation-only event included 38 participants from backgrounds in academia, engineering, allied associations, government and manufacturing.



Workforce Development Summit Report

Developed by: ASHRAE Workforce Development Organizing Committee and designforce, a workforce development consultant and facilitator of the Workforce Development Summit itself.

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The ASHRAE Workforce Development Summit occurred on October 20, 2024, in New York City. The invitation-only event included 38 participants from backgrounds in academia, engineering, allied associations, government and manufacturing. Through breakout sessions, the participants addressed the challenges of **Attracting Talent, Engaging Talent, and Retaining Talent**. Ahmed Kurtom, who also prepared this report, facilitated the Summit.

The Summit was an initiative of ASHRAE's 2024-25 Society theme, *"Empowering Our Workforce: Building a Sustainable Future,"* and by the vision of 2024-25 ASHRAE President Dennis Knight to address the challenge of workforce development currently facing the industry.

Special credit goes to the support provided by the Pacific Northwest National Laboratory for Jamie Kono and Axel Pearson's participation on the organizing committee and Sara Mans's work compiling the results of a pre-Summit survey that the attendees completed.



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PART 1 - EXECUTIVE SUMMARY

The ASHRAE 2024 Workforce Development Summit in New York City brought together 38 industry leaders to address the critical challenges of attracting, engaging and retaining talent in the HVAC&R industry. As we face unprecedented growth projections and technological advancements, our industry stands at a pivotal juncture. The International Energy Agency forecasts a tripling of HVAC&R systems by 2050, with some experts projecting even more dramatic increases.

This report outlines a visionary roadmap for transforming our workforce strategy, focusing on three key areas:

1. Attracting Talent: Rebranding our industry as tech-savvy climate solution providers and creating diverse pathways for entry.

2. Engaging Talent: Developing comprehensive onboarding programs and aligning education with industry needs.

3. Retaining Talent: Fostering a culture of continuous learning, clear career progression, and work-life balance.

Our findings reveal a pressing need to showcase the HVAC&R industry as essential to global well-being and technological advancement. We must emphasize our role in combating climate change, improving quality of life, and driving innovation in intelligent building systems and energy-efficient technologies. This roadmap provides actionable strategies for companies of all sizes to implement effective workforce development initiatives. By embracing these recommendations, we can ensure our industry attracts the brightest minds, fosters engagement and retains top talent to meet the challenges of tomorrow.

Overview From ASHRAE President M. Dennis Knight

Our work in HVAC&R and building science is foundational to modern life. It impacts every building, every indoor environment, and, ultimately, the comfort and health of people worldwide. We are also vital to solving the climate crisis and achieving the targets we've set and the commitments we and the world have made.

Yet, we face a significant challenge that demands immediate attention and innovative thinking. Our industry is poised for remarkable growth. The International Energy Agency (IEA) projects that the number of systems will triple from around 2 billion today to over 6 billion by 2050. I recently attended a meeting in Tokyo with some leading university researchers and industry leaders, and the figure they were using for 2050 was 4 to 5 times the number of systems that exist today.



However, we struggle to attract and retain the talent needed to meet this demand. This isn't just a skills gap; it's a critical juncture that will define our industry's future. But within this challenge lies an extraordinary opportunity. We're not just HVAC engineers; we're climate solution providers, technological innovators and human comfort and well-being engineers.

How many aspiring professionals realize that by joining our ranks, they could be at the forefront of Artificial Intelligence (AI) and Internet of Things (IoT) integration, developing intelligent building systems or pioneering energy-efficient technologies that combat climate change?

Summit Format And Participants

The Summit brought together 38 participants from diverse backgrounds, including academia, engineering, allied associations, government, and manufacturing. The event was structured around three key challenges:

1. Attracting Talent 2. Engaging Talent 3. Retaining Talent

Participants engaged in focused breakout sessions for each challenge, followed by group discussions to consolidate ideas and insights.

Key Findings And Recommendations

1. Attracting Talent

Challenges

- Lack of industry awareness among potential candidates
- Unclear career pathways from high school to the workforce
- Competition with other tech-driven industries

Recommendations

1. Rebrand and Clarify Messaging:

- Redefine HVAC careers to emphasize sustainability, innovation, and global impact
- Develop targeted messaging for different audiences (high school students, college graduates, career changers)

2. Focus on Skill Sets and Non-Traditional Pathways:

- Emphasize required skills over specific degrees
- Create and promote alternative routes into the industry, such as apprenticeships and vocational training

3. Enhance Recruitment Processes:

- Integrate personal connections and mentorship into recruitment
- Leverage diverse role models as industry advocates

4. Support Smaller Employers:

- Provide resources and tailored support for smaller companies to enhance their recruitment efforts

5. Cultivate Inclusive Culture and Management:

- Foster an open environment that emphasizes organizational culture and mission
- Implement a hire-to-train approach, showcasing growth opportunities

6. Revamp Education and Partnerships:

- Update educational offerings to align with industry needs
- Build partnerships with schools and universities to enhance outreach and recruitment strategies



2. Engaging Talent

Challenges

- Disconnect between education and industry needs
- Lack of clear onboarding processes
- Limited exposure to diverse aspects of the industry

Recommendations

- 1. Connect to Mission and Culture:**
 - Integrate technical and mission-driven contexts in daily work
 - Facilitate personal connections and a supportive company culture
- 2. Revamp Onboarding and Development:**
 - Implement comprehensive onboarding programs with clear timelines and feedback mechanisms
 - Offer leadership training and mentorship opportunities
- 3. Diversify Roles and Responsibilities:**
 - Provide variety in job roles to prevent pigeonholing
 - Encourage participation in industry events and ASHRAE chapter activities
- 4. Promote Work-Life Balance:**
 - Use technology to enhance communication and support flexible working arrangements
 - Implement policies that respect personal time and mental health
- 5. Align Education with Industry Needs:**
 - Strengthen partnerships with educational institutions
 - Ensure practical experiences like internships and paid co-ops align with career skill requirements

3. Retaining Talent

Challenges

- Competition from other industries offering higher salaries
- Lack of clear career paths and progression
- Burnout and work-life balance issues

Recommendations

- 1. Create a Supportive Work Environment:**
 - Center organizational culture around a strong mission
 - Set realistic expectations to enhance job satisfaction and retention
- 2. Foster Employee Ownership and Transparency:**
 - Build a culture of trust and engagement
 - Involve employees in decision-making processes
- 3. Establish Clear Career Growth and Development Paths:**
 - Create transparent pathways for advancement
 - Focus on both technical and soft skills development
- 4. Implement Feedback and Participation Mechanisms:**
 - Develop systems for continuous micro-feedback
 - Involve employees in strategic planning
- 5. Enhance Leadership Effectiveness:**
 - Clearly define leadership roles and expectations
 - Promote effective communication at all levels
 - Empower employees to see the impact of their work



Conclusion and Next Steps

The ASHRAE 2024 Workforce Development Summit has laid the groundwork for a transformative approach to talent management in the HVAC&R industry. By implementing these recommendations, companies can position themselves as employers of choice, attracting the best talent and fostering long-term engagement and retention. As we move forward, ASHRAE commits to:

1. Developing resources and tools to support companies in implementing these recommendations
2. Enhancing our outreach and educational programs to align with industry needs
3. Facilitating ongoing dialogue and collaboration between industry, academia, and government to address workforce challenges

Together, we can build a workforce that is not only equipped to meet the technical challenges of our industry but is also passionate about our mission to create sustainable, comfortable, and healthy indoor environments for all.

Acknowledgments

Special thanks to all participants, the ASHRAE Workforce Development Organizing Committee, and our facilitator, Ahmed Kurtom, for their invaluable contributions to this Summit and report.



PART 2 – BACKGROUND AND REFERENCE MATERIALS

Workforce Development Summit Organization

Workforce development cuts across multiple disciplines, and the intent was to have those diverse disciplines represented at the Summit. The Summit sought people from the following disciplines:

- Academics
- Allied Associations
- Consultants/Contractors
- Government
- Manufacturers

To reduce the Summit's carbon footprint, invitations were sent to people who reside or work in the New York City region or were attending the 2024 ASHRAE Decarbonization Conference, which began the day after the Summit in the same hotel. There were 38 participants in the Summit, distributed approximately evenly among the five disciplines.

Before the summit's start, the participants were asked to complete a survey to gain insight into the three challenges of attracting, engaging, and retaining talent.

Summit Format

The Summit was structured to ensure that the focus was on **attracting, engaging and retaining talent in the HVAC industry**. Each topic was addressed with the group and then the attendees were split into breakout sessions which provided an opportunity for robust discussion. A quick debrief was conducted at the end of each breakout session to share highlights and insights with the whole group. This allowed the ideas to be consolidated and everyone to get aligned.

This report summarizes the results and key takeaways of the pre-summit survey and the key points and takeaways from the Summit breakout sessions.

Attracting Talent Portion Of The Summit

SURVEY RESULTS



Question 1:

In your opinion, what is the most effective outreach method to attract potential candidates?

Responses:

- **Internships/Pre-Apprenticeships** emerged as the most effective outreach method chosen by **73%**
- **Recruitment at Trade School & College-Level Events** (e.g., career fairs) is the second most effective method, with **70%**
- **Recruitment at High School-Level Events** (e.g., STEM Summer Camps) was favored by **40%**
- **Outreach to Underrepresented Groups** (e.g., low-income, women, and minority groups) was selected by **~37%**
- **Word of Mouth/Personal Recommendation** is also seen as a viable method chosen by **33%**
- Less effective methods include engaging at **Grade School-Level Events 13%** and posting to **Online Job Boards** or **Industry Job Boards**, each chosen by **10%**

Question 1 Key Takeaway

Respondents showed a clear preference for **proactive, targeted** recruitment efforts. The results emphasize the **effectiveness of focusing on educational institutions**, particularly trade schools and high schools, and offering **internships or apprenticeship programs** to attract new candidates.

There's also significant attention on diversity, with outreach to underrepresented groups ranking as a moderately important strategy.

Question 2:

What does your organization do to attract a broad candidate pool?

Responses:

Organizations use a multifaceted approach that includes:

- Educational outreach
- Online recruitment
- Partnering with external organizations
- Leveraging reputation and branding
- Targeted initiatives for underrepresented groups

Question 3:

In your opinion, what messaging about HVAC careers is most impactful for potential candidates?

Responses:

- **Fulfilling, Purposeful Work** (e.g., combating climate change, improving quality of life, expressing creativity) is the most influential message, with **93%**
- **Remuneration / Salary** is the second most impactful, chosen by **63%**
- **Clear Career Advancement Pathways and Promotion Opportunities** ranks third with **56%**
- **Work/Life Balance** is mentioned by **36%**
- **Paid Time Off and Family Leave** are the least impactful, with only **10%**

Question 3 Key Takeaway

The findings suggest that **emphasizing meaningful and purposeful work**, competitive salaries and clear career growth resonates most with potential candidates.

Question 4:

What methods will be the most effective for ASHRAE and other industry groups to help attract/expand a broad candidate pool?

Responses:

- **Encourage Job Placement Programs** (e.g., certification leading to employment) is the most favored method selected by **63%**
- **Outreach to New Audiences** is the second most effective strategy, with **53%**
- **More Social Media Presence** ranks third with **40%**
- **Both Create More Networking Opportunities & Offer More Educational Opportunities** were equally valued and chosen by **~37%**
- **Develop New Certifications** was selected by **20%**
- **Hold More In-Person Meetings** is the least favored, with only **~7%**

Question 4 Key Takeaway

The results suggest that **practical approaches** like job placement programs, audience outreach, and increased social media engagement are perceived as the **most effective ways** to attract a broader candidate pool.

ATTRACTING TALENT BREAKOUT SESSION

Breakout Discussion Summary

This breakout session on **Attracting Talent** focused on

1. Rebranding and re-messaging HVAC
2. Figuring out non-traditional pathways
3. Defining a skill set, not just a degree

Rebranding

HVAC is a profession that can be difficult for others outside of the industry to understand. Instead of promoting the technical aspects, it was recommended that the industry emphasize topics people can relate to, such as indoor climate, sustainability, and energy efficiency. An idea for creating an 'umbrella brand' for the profession was proposed that would encompass all professionals outside of the industry; for example, pitching to a chemical engineer that those skills could be used for heating and cooling.

Public relations is necessary to attract talent. Its role includes developing messages, reaching out via appropriate social media channels and engaging influencers. The industry has a call to action to improve its branding: to focus on the importance of the work, its positive impact on the environment, and lifelong learning and growth. There was consensus that the message for those considering or entering the industry should not be so intimidating and that the knowledge required should be toned down.

Non-traditional pathways

The attendees addressed traditional ways students enter the industry through colleges and universities.

It was recognized that parents play a significant role in their children's career decisions and there should be outreach to parents to tell and guide them to consider HVAC&R as a career for their children.

The consensus among session attendees was that the industry should continue to reach out to high school students, but perhaps with a strategy to address their thought process on 'what I want to do with my life.' ASHRAE was encouraged to reach out more to its Student Branches to help reach high school students and students early in their college education.



However, the industry needs to adapt to the changing education track. It needs to recognize that not everyone can go straight to college because they need to work and earn money.

Beyond rebranding the industry and making it easier for others – new or professionals already in a career – to enter the industry, the attendees explored new career pathways for entering the industry, specifically non-traditional pathways. There is a need to better define career pathways from high school to the workforce for non-degree and the path for college students. Trade schools have a substantial overlap between student learning and on-the-job training.

It was debated to what degree of focus should be on recruiting from vocational, technical, community colleges or apprenticeships if there are not enough students attending traditional schools. The industry needs to know what target to shoot for and calculate how many engineers need to be educated in a sector, how many universities have that program, and how many students are enrolled.

Employers have a major role in attracting talent to the industry and promoting that role to potential employees. Companies should offer education reimbursement or professional development and promote it in job opportunities. Employer support is critical for investing in people through education and identifying mentors responsible for helping new hires develop. Guidance is needed when the career path is not straight – someone needs to help new hires determine if the career path chosen is the right choice or if a change to another career should be made. Are there opportunities to train people on different career paths? Needless to say, applying for a position must be quick and easy to attract applicants. Questions were raised about how industry jobs can be made more attractive.

Defining a skill set

The shortage of skilled labor in the field is impacting projects. In addition to attracting talent, it is essential to determine what skill sets are needed. Job openings currently list specific skills, but a definition would be better with an example of the type of work to be accomplished. Employees of different ages, backgrounds, and disciplines work on buildings, so why not highlight their skill backgrounds with the type of work they do to help potential employees develop a vision for the position they will be going into? To obtain the skills, employers could create multi-month training programs for more diverse groups, such as Workforce Development Training.

There was support for emphasizing the importance of skilled work. There was also concern for a potential barrier where there may be a management issue (old way/new way mentality) in perspectives of acceptance for new technology implementation. New skills are needed for new business practices for a new generation of workers at all levels, especially in teaching leadership skills and upskilling leaders.



Attracting Talent Breakout Session Key Takeaways

- **Rebrand and Clarify Messaging:**
 - Redefine HVAC careers to ensure clear, impactful messaging that resonates with target audiences and their influencers (parents, educators).
- **Focus on Skill Sets and Non-Traditional Pathways:**
 - Emphasize required skills over degrees and promote alternative routes into the industry.
- **Enhance Recruitment Processes:**
 - Integrate personal connections, mentorship, and hands-on experiences into recruitment while leveraging diverse role models as advocates.
- **Support Smaller Employers:**
 - Provide resources and tailored support for smaller companies to enhance their recruitment efforts.
- **Cultivate Inclusive Culture and Management:**
 - Foster an open environment that emphasizes organizational culture, mission, and a hire-to-train approach, showcasing the attractiveness and impact of positions.
- **Revamp Education and Partnerships:**
 - Update educational offerings to align with industry needs and build partnerships to enhance outreach and recruitment strategies.

Engaging Talent Portion Of The Summit

SURVEY RESULTS



Question 1:

What do organizations do to integrate new talent through onboarding and engagement?

Responses:

- **On-the-Job Training** is the most common approach, selected by **~66%**
- **Teaming New Employees with Experienced Ones** (e.g., mentoring, peer partners) follows closely, with **62%**
- **Support for Certificates, Certifications, and/or Licensing** is also popular, chosen by **48%**. **Professional Development Funds** are utilized by **~45%**
- Both **Teambuilding and Face-to-Face Interactions & a Structured Onboarding Program with Timeline, Feedback and Compensation** were selected by **~52%**
- **Wrap Around Services** (e.g., childcare, transportation assistance) are less commonly offered, with only **24%**

Question 1 Key Takeaway

Practical and interactive methods, such as **on-the-job training, mentoring, and structured onboarding programs**, are seen as the most effective and commonly used strategies for integrating new talent.

Question 2:

The most important soft/employability skills a new employee needs to successfully integrate?

Responses:

- **Communication** is the most critical skill, with **90%**
- **Positive Attitude** is the second most important skill, by **~77%**
- **Problem Solving** is valued by **63%**
- **Time Management** was selected by **30%**
- **Digital Literacy** was noted by **10%**
- **Conflict Resolution** **~7%**
- **Sales** **3%**

Question 2 Key Takeaway

The findings suggest that **strong communication skills, a positive attitude, and problem-solving abilities** are the most crucial 'soft skills' for successful integration of new employees in the HVAC industry.

Question 3:

Considering new and emerging technologies, what aptitudes does a new employee need?

Responses:

- **Openness and Willingness to Learn:** A recurring theme is the ability to learn continuously, adapt, and remain open-minded in the face of new and unfamiliar technologies. Respondents highlight the importance of being comfortable with challenges and being willing to explore and acquire new skills
- **Technical Aptitude and Digital Literacy:** Respondents stress the need for basic technical skills such as digital literacy, proficiency with numerical simulation tools, and the ability to work with AI or data analytics. Familiarity with emerging areas like heat pump technology and decarbonization strategies is also mentioned

Question 3 continued:

- **Critical and Creative Thinking:** The ability to engage in problem-solving, systems thinking, and integrative thinking is emphasized. Employees should approach challenges holistically, considering innovative and interdisciplinary solutions
- **Communication and Collaboration Skills:** Effective collaboration, especially in-person, and communication skills are essential. With post-COVID challenges, there is a noted importance of retaining and improving interpersonal skills
- **Adaptability and Proactivity:** Employees should be adaptable, proactive, and have the capacity to change their mindset as technologies evolve. A desire for continuous self-improvement and the ability to learn from mentors are also seen as crucial traits

Question 3 Key Takeaway

Overall, the responses indicate a need for a **balance** between **technical skills, adaptability** and a **proactive, lifelong learning mindset**.

Question 4:

What can ASHRAE and other industry groups do to integrate new talent through onboarding and engagement?

Responses:

General Themes

- Structured pathways and clear roadmaps
- Mentorship and peer support
- Training and educational support
- Engagement with local and underrepresented groups
- Communication and social media
- Supporting students and young members
- Onboarding programs

ENGAGING TALENT BREAKOUT SESSION

Breakout Discussion Summary

The discussions addressed how to onboard new employees, ideas on how companies could change to better improve engagement, and ASHRAE's contribution to improving engagement and career paths.



When new employees, especially those that are just starting their careers, start a job, it is important to make them feel welcome and to experience positive morale with the company. However, what seems to be happening most is that new employees end up doing low-level work and not using what they were trained to do, and they tend to be pigeonholed into one skill. This was attributed to companies not being mission-driven organizations. Numerous suggestions were made to avoid this and to create a positive morale experience for the employees.

One of the first recommendations is to follow through on the work assignment discussed when they were offered the position. For new hire's first two years of employment, it is important to deliver on the 'brand promise' made during the interview – is the organization set up to do that? Are professional opportunities available to help deliver on that promise? Or for career advancement?

Another is to connect how their work contributes to the greater mission. Another is to shift from describing work with a singular focus on a specific work assignment to a whole-building-system-focus that provides a greater perspective on how the work contributes to the success of a project.

It was recognized that students understand buildings and have bright ideas and want to contribute them. The industry messaging should address that understanding and need to contribute by engaging 'whole building system free-thinkers' and to get them excited to be a part of the industry.

Other practical applications suggested were providing rotational experiences in the job and the need for upscaling managers to recognize traits in their direct reports to provide incentives, how to get best practices from them and implement those practices.



Another approach is to expand the onboarding process to a company-wide approach. Focusing on a beginning engineer, seasoned employees should be asked what they are doing to help or to address challenges experienced by the new engineer. As employees move up in the company, are they being asked to encourage or support others on their career path to do the same? Can new engineers who work on a project be given the opportunity to be reassigned to work on a new project for the purpose of realizing new possibilities that could be a better fit for their skills?

Wrap-around benefits are important to engagement and job satisfaction, especially when they are created with the employee's input. Childcare, transportation, remote working, professional development -- all contribute to creating a successful work/life balance for employees.

The attendees addressed what they considered the biggest engagement challenge – keeping mid-career people engaged. When these people leave with their expertise and networks, it is hard to bring in replacements. Attendees advocated constant succession planning for those behind mid-level employees. Likewise, having a career path for mid-career employees, stock option programs and/or an associate program can all help to retain those people.

Networking is also essential to connecting with the industry.

The conversation turned to ASHRAE on this topic. Many employers do not support attending ASHRAE events because they are afraid their employees will be hired away. It was felt that if you feel that way as an employer, you probably are not providing the opportunities to keep your employees engaged and employed with your firm. The consensus was that companies do not interact with local ASHRAE Chapters, And the observation was made that there is a drop-off in ASHRAE involvement, and the challenge is getting new people involved. It was suggested that ASHRAE change the business model to meet people where they are – what are people willing to contribute, what is the implication on the business. ASHRAE Chapters can be a resource for advancing careers. ASHRAE Student Branches are vital in developing success and engagement early on. Like company mentors, Student Branch Advisors are the key to a branch's success.

Engaging Talent Breakout Session Key Takeaways

- **Connect to Mission and Culture:**
 - Integrate technical and mission-driven contexts to foster personal connections and a supportive company culture.
- **Revamp Onboarding and Development:**
 - Implement effective onboarding programs with clear career pathways, offering leadership training and mentorship opportunities.
- **Diversify Roles and Responsibilities:**
 - Provide variety in job roles to prevent pigeonholing, encourage participation in chapter events, and celebrate team successes.
- **Promote Work-Life Balance:**
 - Use technology to enhance communication and support a healthy work-life balance.
- **Align Education with Industry Needs:**
 - Strengthen partnerships with educational institutions to ensure practical experiences like internships and paid co-ops align with career skill requirements.



Retaining Talent Portion Of The Summit

SURVEY RESULTS



Question 1:

What does your organization do to maintain and retain the current workforce through upskilling and motivation?

Responses:

- **Performance Reviews** are the most commonly used method, with ~**68%**
- **Teambuilding and Face-to-Face Interactions** rank second, also chosen by ~**68%**
- **Ongoing Professional Development** is utilized by ~**54%** to support and upskill employees
- **Clear Career Advancement Pathways and Promotion Opportunities** are provided by **46%**
- **Annual Total Salary Reviews** are implemented by ~**43%**
- **Promote Industry Memberships & Support Certifications and Licensing** each received support from **39%**
- **Tuition Reimbursement** is offered by ~**29%**, while **Wrap Around Services** (e.g., childcare and transportation benefits) are provided by ~**18%**
- **Defined Bonus Structure** is used by **25%**

Question 1 Key Takeaway

The results show that many organizations commonly use strategies like **performance evaluations, team-building activities, professional development, and career advancement opportunities** to help upskill and retain their workforce.

Question 2:

The most effective methods to maintain and retain the current workforce through upskilling and motivation?

Responses:

- **Ongoing Professional Development** is the most effective method chosen by ~**66%**
- **Clear Career Advancement Pathways and Promotion Opportunities** are the second most effective approach selected by **55%**
- **Teambuilding and Face-to-Face Interactions** are also highly valued with **38%**
- **Support Certifications and Licensing** was highlighted by ~**35%**
- **Annual Total Salary Reviews** were chosen by ~**21%**
- **Promote Industry Memberships** received support from **17%**
- Less frequently selected methods include **Tuition Reimbursement** ~**14%**, **Defined Bonus Structure** **10%** and **Wrap Around Services** (e.g., childcare and transportation benefits) **7%**
- **Performance Reviews** were the least favored with only ~**4%**

Question 2 Key Takeaway

The findings emphasize that **professional development** and **clear career pathways** are perceived as the most impactful methods for workforce **retention** and **motivation**.

Question 3:

What can ASHRAE and other industry groups do to maintain (and retain) the current workforce through upskilling and motivation?

Responses:

General Themes

- Clear communication and messaging
- Training and development opportunities
- Mentorship and networking support
- Community engagement and partnerships
- Recognition and incentives
- Industry-Specific information and resources

RETAINING TALENT BREAKOUT SESSION

Breakout Discussion Summary

The participants addressed the marketplace pressures on retaining employees and identified steps that could be taken to improve retention of current employees.

The top concern was the salaries being offered by large companies to pull top talent away from smaller firms. The level of high salaries can be sustained by larger organizations because of systematic laying off people in other areas of the company. For smaller firms, there are many other marketplace issues affecting compensation, such as inflation, other business-related expenses and regulation, and other sectors that are hiring engineering talent, such as the financial industry and tech/software industries. The competition with other engineering firms for business means that there is not as much revenue available to compensate employees. Another concern is that the salaries of engineers as compared to other engineering careers, such as chemical engineers, have not kept pace as experience and tenure accumulate. The mechanical engineers' salary cannot continue as low as it is – every job has to be family-sustaining and upwardly moving.

Money matters – it may not be the most important thing, but it is important. A key to compensation is to figure out what can influence an employee. One approach is to do a culture/compensation survey right before budgeting.

After addressing the outside forces on compensation, the Summit attendees explored ways to retain existing employees. These centered on the person, such as employee mental health – defining sick days to include mental health days or identifying 'mental health days.' Providing opportunities to address employee concerns shows employers are dedicated to employee's well being.

There were numerous comments promoting direct communication with the employee. Asking direct questions of the employee is the best way to get meaningful feedback, and a mentorship program can be another outlet for employees to be heard. Leaders should help employees define 'what do you want to do?' It is important to help the employee see the impact of their work on the overall project as well as to promote a feeling of project ownership. Project feedback describing the success stories and professional growth



opportunities create an understanding of how the project went, which creates a positive work environment for the organization. Direct communication with employees is necessary to understand the evolution of an employee's professional growth needs and how those change over time. Soft skill development should address and complement those growth needs.

The discussion shifted from using engagement to retain employees to identifying other contributing factors.

Rewards and recognition were identified as very important, also, so that the employee feels acknowledged for the work that they have been doing. Examples include a rewards program that allocates points that can be redeemed for gifts or attending a conference or seminar. The group cautioned that the rewards should align with the company's mission and support the behavior for progressing in the position. Also, the rewards should be sustainable – pulling back a rewards program can be challenging.

It was recommended organizations try implementing other benefits that don't exist in other organizations, such as those that support a work/life balance, including parental leave and caregiver leave.

Also, 'initiatives' can play a positive role in retaining employees. This can include providing 'volunteer time off' of 40 hours a year to do things important to the employee.

In addition to initiatives, rewards and programs aimed at work/life balance and mental health, the attendees addressed upskilling and career paths as retention tools. There was recognition that the employee should have the motivation to learn whatever the new skill is needed for an assignment – there should be some level of initiative to be aware of how a field is evolving and how to stay relevant. Leadership needs to be alert to these efforts and changes in the field. Non-traditional career pathways can be intertwined with the engineering field, bringing forth skills that aren't predefined for a position but are flexible enough to provide multiple paths to get into that role. Resource planning is needed to help prevent employee burnout.

Performance reviews can be helpful in identifying and developing skills needed to progress in the organization. The focus should be more forward-looking, and the manager should work with the employee to develop the skill sets needed. An example was given how a company moved away from performance reviews and instead created a quarterly staff career development program. The program was helpful in identifying the skills the employee needed and to help advance their careers. A promotion system was created as well. There was no tie to salary. The organization reported the program was positive in retaining talent.

Retaining Talent Breakout Session Key Takeaways

- **Start by understanding and communicating your WHY**
 - Create a supportive work environment centered around a strong mission, with realistic expectations to enhance retention.
- **Employee Ownership and Transparency:**
 - Foster a culture of ownership and transparency to build trust and engagement.
- **Career Growth and Development:**
 - Establish clear pathways for advancement, focusing on both technical and soft skills to support holistic employee development.
- **Feedback and Participation:**
 - Implement mechanisms for micro-feedback and involve employees in strategic planning, ensuring their voices are heard and valued.
- **Leadership Effectiveness:**
 - Clearly define leadership roles, promote effective communication, and empower employees to see the impact of their work.