TECHNICIAN CERTIFICATION FOR THE HVACR INDUSTRY \ FEB. 2021 Constructing Pathways to Success NATE'S CERTIFICATION TOOLS PREP TECHS TO PROSPER

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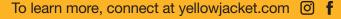
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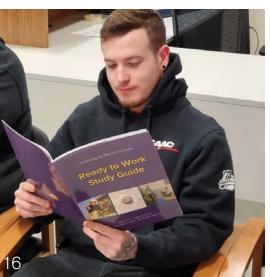
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Constructing Pathways to Success

ver the past two years, NATE has added a full slate of new initiatives to our services. We have published a series of official study guides, introduced Live Online Proctoring (LOP) so technicians can take our exams online, launched the NATE online training platform, and developed a new certification pathway—the Certified HVAC Professional (CHP-5). Our intent behind each of these initiatives is to better support contractors, technicians, and the wider HVACR community. I am proud of our team and their work to expand and modernize the ways NATE serves our industry. In this issue, we are sharing the story behind each of these offerings, so you can better understand how NATE can best serve you.

NATE study guides have quickly become the most popular item in our online store since we introduced them in the fall of 2019. Our guides are focused, graphics-oriented, and have practice exams at the end of every chapter. We worked with our Technical Committee and Scantron's Learning Solutions team, which specializes in the development of study guides for adult learners, to develop professional guides. In this issue, you can find conversations with members of our Technical Committee and hear more about how they created the NATE study guides.

We introduced two online-based offerings this past year to provide technicians with more opportunities to train and test online—our Live Online Proctoring (LOP) and our online training platform. Through LOP, introduced this spring, technicians can take an exam from home while a qualified proctor monitors them remotely in real time using their webcam to ensure the integrity of the exam.

Over the summer, we launched our online training platform to help technicians prepare for NATE exams. The platform contains online training created by two of our partners, InterPlay Learning and HVACRedu.net. With the portal, we have been able to modernize and expand our support for technicians as they work towards certification. Technicians can find training videos, virtual technical trainings, and 3D simulations that all directly correspond to subject domains covered by

I am particularly proud of our newest development, the Certified HVAC Professional (CHP-5). The CHP-5 is a NATE certification pathway that technicians can choose as an alternative to the traditional Core and Specialty exams. The certification is made up of five 30-question exams, each on a different subject domain. We developed the CHP-5 certification pathway after conducting surveys in 2019, where we learned that many contractors wanted training and certification to reflect the way technicians learn on the job, and believed their technicians would prefer certification exams in smaller segments. In this issue, you can find interviews with a recently certified CHP-5 technician, as well as a technician that took our traditional pathway exams, so you can learn more about how technicians have decided which NATE certification pathway is the best fit for them.

At NATE, we are determined to provide initiatives that not only prioritize the training and recognition of technicians but also make our organization more accessible. I believe NATE has created the platform technicians need to grow and develop professionally, and I am looking forward to continuing to build awareness in our community of all NATE has to offer.



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Have a question for NATE? Please email us at asknate@natex.org!

I'D LIKE TO PROMOTE NATE ON MY COMPANY'S WEBSITE. WHERE CAN I FIND A COPY OF NATE'S LOGO?

The NATE logo is a visual representation of our brand, and as a certification organization, proper usage is key to increasing awareness for what we do: Certifying the finest in HVACR. We have Contractor Partner logos available in .eps (print), .png (web), and .jpg (web). You can find a logo usage request form on our website, on our Contractors - Advertising Resources page.

If you have any questions about using the NATE logo, please contact NATE at askNATE@ natex.org, or call us at 877-420-NATE.

A CANDIDATE AT MY TEST SESSION DOES NOT HAVE A NATE ID. WHAT SHOULD I DO?

If a candidate is new to NATE and taking his or her first exam, then they may not have a NATE ID. When administering a paper exam, please leave the NATE ID number field blank. When setting up an online test session, please leave the NATE ID number blank and enter the candidate's email address.

IN WHAT LANGUAGES DO YOU OFFER **NATE EXAMS?**

NATE offers several of its certification exams in Spanish, and all NATE exams are available in English. The following exams are currently available in Spanish: Ready-to-Work Exam, HVAC Support Technician Exam, CORE Exam, Air Conditioning Service Exam, Air to Air Heat Pump Service Exam, and Gas Heating Service Exam.

If a technician would like to take the exam with a translator, they can complete the Request for Non-standard Accommodation form. Please note that translators cannot be used during remote Live Online Proctor (LOP) sessions.

If a technician registers for a Spanish exam online using LOP, their online proctor will speak English only. The proctors' responsibilities will be to greet and set up the technician at the start of the exam, and to monitor the testing room for the duration of the exam.

Word Search Т Expertise Η M 0 S Α S Τ Ε U γ Certificate Ι R Ε С Ρ 3. Pathway W Η Τ Ρ Ζ М Α M Hydronics R 5. Service G Н Ν L Ε S Ι R Ε Ρ Χ Ε 6. Online Efficiency Ε Н C C Ε 8. Maintenance S Т Ε Ι Ν Т Α Α 0 R L L Т Ν Installation Ι Ε D Ε R 10. Credentials Т Ε Т Α Τ Ν C \mathbf{E} Χ M N М 11. Comfort R 0 Ν Ι С S Е R 12. Thermostat

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2021

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NATE News

AHRI INDOOR AIR QUALITY CAMPAIGN

COVID-19 has not only affected how HVACR technicians work in the field by adding new requirements to use face masks and other personal protective equipment, but it has also changed the type of questions and work requests they are receiving from home and business owners. People are asking more questions about how their heating, air conditioning, and ventilation systems are affecting the spread of the virus – and for good reason. Studies have increasingly shown that air quality can help control the spread of COVID-19.

Air-Conditioning, Heating, & Refrigeration Institute (AHRI) has created a guide outlining the technologies we can use in school buildings to make in-person learning as safe as it can be. You can find more information on how we can optimize HVACR systems to mitigate potential viral spread on AHRI's website: www.ahrinet.org/iaq

DEADLINE EXTENDED FOR NATE RECERTIFICATION

NATE is aware that many training courses and testing sessions have been canceled to prevent the spread of the COVID-19 virus. If you are unable to complete your continuing education hours and your certification expired or is expiring between November 1, 2019, and March 31, 2021, please contact us at askNATE@natex. org to request an extension. Please note this is an update of an earlier announcement that only allowed extensions through December 31, 2020.

If you are interested in online training opportunities, you can find a list of available online training courses on our website, www.natex.org.

FOLLOW NATE ONLINE

Did you know you can find NATE on Facebook, Twitter, Instagram, and LinkedIn? Follow NATE on social media to stay up-to-date on the latest NATE news, training opportunities, technician spotlights, and trivia.

You can find NATE on Facebook at fb.com/ NATEtechnicians, on Twitter at twitter.com/ NATEtechnicians, Instagram at instagram.com/ nate_techs, and on LinkedIn at www.linkedin.com/ company/natetechnicians.

Industry News

RECOGNIZING AN INDUSTRY CHAMPION

John Ehlen, Endeavor Business Media's (EBM's) senior account manager and publisher of the *NATE Magazine*, has retired.

John's decades of experience in the HVACR industry, first working for Honeywell and then spending 20 years in the HVACR



media market with EBM and its predecessors, provided him with unmatched knowledge and insight into our industry. John successfully translated that experience into actionable information for his long lists of clients. He worked tirelessly to find ways to assist his customers get their unique messages in front of EBM's audiences of contractors, engineers, and end-users.

As a case in point, John was instrumental in helping to launch the *NATE Magazine*, collaborating with NATE, manufacturers, distributors, and contractors to promote the importance of technician excellence. He envisioned that the magazine would serve as a communications vehicle to educate the industry on NATE's objectives and industry-related topics.

Over the years, the magazine has done just that. It has evolved into a multi-issue, award-winning, print and online publication that covers the only technician certification organization in the industry that continues to build industry standards.

John's commitment to the HVACR industry was appropriately recognized in 2012 when HARDI awarded him its Outstanding Dedication Award. And in 2017, AHRI presented John with the AHRI Public Service Award.

We wanted to take this opportunity to thank you, John, for what you have done for your friends, coworkers, customers, and the industry. We wish you good fortune as you start an exciting new chapter of your life. We will miss you!

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Certified Professionals

NATE'S NEW CERTIFIED HVAC PROFESSIONAL PROGRAM OR THE MORE TRADITIONAL CERTIFICATION PATH? EITHER CHOICE MAKES HVACR TECHNICIANS MORE MARKETABLE.

s we enter a new year, it is traditional to reflect on the previous one. In 2020, our nation endured a global pandemic, civil unrest, and a volatile election. But we've also seen neighbors helping neighbors and strangers helping strangers as we've navigated a long and winding road to 2021.

Through it all, home service technicians have been on the front lines, seeing to the comfort of homeowners during stay-at-home orders. HVACR technicians donned personal protective equipment and established safety protocols to protect their customers while making repairs or installing new equipment.

It is critical that these essential workers have the technical expertise to get the job done correctly. Proper training is the way to accomplish this, and certification is the avenue to demonstrate it.

Last year, NATE rolled out a new certification path for HVACR techs — the Certified HVAC Professional program, or CHP-5. This program breaks down the traditional core exam and various specialty exams into five 30-question exams. Techs can take the exams in any order and at their convenience.

But developing the new path took several years of planning.

"Earning a NATE certification is something pretty special," notes John Lanier, NATE's chief operating officer. "The traditional exams are very challenging; you have to know what you're doing. But we learned from talking to many contractors that they were hiring individuals with little or no HVACR experience because the job market's pretty tight. They expressed a desire for NATE to help ultimately develop these individuals into qualified, competent technicians."

Kevin Dier, the current chair of NATE's Board of Directors and vice president of business development at Johnstone Supply, recalls: "At the board level, we had a number of discussions early on of what we thought was inhibiting our ability to get more technicians engaged with the certification program. And one of the things we received feedback around was that there was some test anxiety, which is normal, but it was made worse by the fact that these were great big exams. They covered a lot of territory.

"Understanding that," he continues, "we started to look at how to break them down into more bite-sized pieces to make exams more approachable to people and, at the same time, give them an opportunity to get some early wins to build momentum in the process of completing a NATE certification."

First on the agenda was establishing the Ready-to-Work certificate program.



FERRILARY 2021



This entry-level, online-only exam is designed for technicians who are just entering the HVACR field, with little to no formal education or training. A downloadable study guide focuses on fundamental job knowledge and skills — safety, tools, HVACR equipment. Those who pass this exam earn a certificate, not a NATE certification.

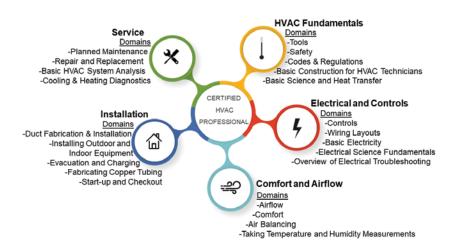
Next was the HVAC Support Technician certificate exam, designed to support technicians who have worked in the field for six months to a year. "The support technician exam moves the tech from the entry-level position to getting him or her in a truck to start doing standard service calls, such as spring and fall tune-ups," Lanier notes. "It was a two-step process, if you will, before our more challenging, comprehensive exams."

Topics linked to the NATE professional level certifications are covered but at a more fundamental level. Earning this certificate demonstrates increased knowledge and skills, strengthening the foundation needed to pursue NATE's professional credentials.

From there, HVACR techs have the option of going the traditional NATE certification route — the 50-question Core Exam, and one or more of the 100-question specialty exams — or taking the CHP-5 path.

CHP-5 covers five broad subjects: HVACR fundamentals, electrical and controls, comfort and airflow, installation, and service. And while techs can take the exams in any order, NATE recommends taking the exams in the order listed above for the easiest progression. Candidates can take up to six months between each exam to study and prepare.

"We believe that starting with the fundamentals, then moving to electrical and controls, then comfort and airflow, then installation and ultimately service, mimics how technicians learn in the field," Lanier explains. "With that series of five exams, instead of technicians having to pretty much understand everything there is to know about HVACR equipment, installation, service, and repair, they learn it a bit at a time."



NATE's innovative Certified HVAC Professional program consists of five 30-question exams. Each exam covers one of five different subject domains: HVACR fundamentals, electrical and controls, comfort and airflow, installation, and service.

TRADITIONAL VS. CHP-5

So how do techs like the different certification paths? NATE-certified Aaron Phillips, a service technician for Portland, Oregon-based Evergreen Gas, took the Core Exam as well as two specialty exams: Gas Heating Service and Gas Heating Installation. Brian McCann is an HVACR service tech with Williams Comfort Air in Indianapolis who worked his way through the CHP-5 program.

Phillips is a 17-year veteran of the HVACR industry, but he stumbled into it. "When I was 18, I happened to run into an old friend from childhood. His stepfather owned a mechanical contractor company looking for part-time help in the summer. So, I tried it, working part-time seasonal doing coil cleanings and filter changes for \$10 an hour cash. I liked it and learned everything I could on the job."

In April 2020, Phillips was laid off from his sales and estimating job at a union mechanical contractor because of the COVID-19 pandemic. Shortly after that, he landed the residential service tech position at Evergreen, where NATE certification within 60 days was an employment requirement. Phillips obtained his three NATE certifications in September 2020.

"When I started with Evergreen, that's when the very first news article broke about CHP-5," Phillips recalls. "I had brought it up to ownership, but being that it was so new and we had such a short timeline to get my certification, we stuck with what we knew at the time to make it happen."

Taking the exams was a little stressful because of the number of questions and the time it took, but Phillips says the most difficult part was studying. However, his on-the-job training and years of experience were invaluable.

"Had it not been for my length in the industry, I feel like I would have failed the test for sure. Fortunately, a lot of it was retained knowledge from experience; it's why I was able to pass."

McCann is a retired autoworker who gravitated toward the HVACR industry because of his interest in building automation — and the fact that he could work all year instead of living the feast-or-famine existence of the auto industry.

"I was looking to start a new career, and HVACR was perfect because you can do as little or as much as you want," he notes. "Your income potential is unlimited, whether you pick commercial or residential. You can learn something new every day. I'm never bored."

He enrolled in Midwest Technical Institute, based in Illinois, where he took classes four hours a day, five days a week, for nine months. "We always were told in school to get NATE-certified," McCann explains. "They said, 'Hey, get NATE-certified; it really makes you look good with your employer.'"

McCann started with Williams Comfort Air about four years ago. He was one of the first five people to go through CHP-5 certification last year; he also took and passed the NATE Core and Gas Heating Service exams while in school. The company paid for McCann to take a CHP-5 training/study class.

"The CHP-5 tests are shorter, but the way they word those questions, you really have to know what you're doing to get it right," he says. "It's not like they dumbed the test down to get more people certified. They have a good program there, for sure."

McCann believes the shorter tests will allow more techs to become certified. For Williams Comfort Air, that is a big selling point; it's a Carrier dealer, and Carrier requires that 51 percent of a dealer's technicians must be NATE-certified.

"NATE certification means something at my company," McCann says. "Continuing education is your best friend in this industry. If you're not learning new stuff, you're just dying. What's nice about NATE certification is that it makes you more marketable in the industry. It cannot hurt you. And it makes us look more professional."

Phillips agrees: "If I was an employer and my employees could pass the NATE exams, knowing what's all entailed in them and what kind of comprehension they require, I would feel more comfortable and more confident in them."

To learn more about NATE's Certified HVAC Professional program, visit www.natex.org/CHP5. To learn more about NATE's traditional certification path, visit www.natex.org/site/337/Technicians/Exams-Offered. ●



"IF I WAS AN EMPLOYER AND MY EMPLOYEES COULD PASS THE NATE EXAMS... I WOULD FEEL MORE COMFORTABLE AND MORE CONFIDENT IN THEM."

- Aaron Phillips, Service Technician, Evergreen Gas, Portland, Oregon.



"YOUR INCOME POTENTIAL IS UNLIMITED, WHETHER YOU PICK COMMERCIAL OR RESIDENTIAL. YOU CAN LEARN SOMETHING NEW EVERY DAY. I'M NEVER BORFD."

-Brian McCann, HVACR Service Tech, Williams Comfort Air, Indianapolis.

Kelly Faloon is a contributor to the NATE Magazine.

NATE's Online Offerings **Evolve to Meet** Technicians' Needs in 2021 and Beyond

ONLINE TRAINING PLATFORM AND LIVE ONLINE PROCTORING HAVE BEEN ENHANCED FOR THE VIRTUAL, REMOTE WORLD.



ver the past several months, NATE has made two additions to its online offerings. It has introduced an Online Training Platform and Live Online Proctoring (LOP). The goal of these offerings is to construct pathways to success for NATE technicians.

THE FUTURE OF TRAINING IS HERE

NATE has partnered with several organizations for its new Online Training Platform. The platform matches up remote HVACR training with a new, alter-

native certification pathway for technicians. The partners are Interplay Learning (www.interplaylearning. com/personal/hvac), a provider of online simulation programs (virtual reality) for HVACR technicians, and HVACRedu.net (https://hvacredu. net/), an online technical training school. Through the partners' sites, HVACR technicians can train to take NATE's new Certified HVAC Professional (CHP-5) certification pathway series.

The CHP-5 consists of five 30-question exams. Each exam covers one of five unique subject areas: HVACR fundamentals, electrical and controls, comfort and airflow, installation, and service. Candidates can take as long as six months between each test to prepare and study. Go here for details on the CHP-5 career path: www.natex.org/chp5

NATE is partnering with Interplay Learning to match up remote HVACR training with the new, alternative CHP-5 certification pathway for technicians. The partnership signifies the readiness of the trades to effectively move into the future of training.

Doug Donovan, CEO of Interplay Learning, says, "We are very excited to be partnering with NATE to help the HVACR industry train technicians more safely and effectively with online learning." The collaboration meets a genuine need. With a growing shortage of skilled labor in the U.S. compounded by a global pandemic, traditional training programs are unable to meet industry demand for skilled workers.

The established format known as "micro-learning," which is at the core of the Interplay SkillMill platform, is now directly linked with the CHP-5 NATE credentialing program. It is available through preparatory classes for NATE's new certification initiative.

"Pushing the industry forward is

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WHITE-RODGERS



NATE Director of Testing and Education Anthony Spagnoli. He adds, "Offering remote online learning with a direct pathway to certification gives us an opportunity to modernize and expand." NATE's rollout of its CHP-5 pathway allows users to attain a NATE certification through shorter, topic-focused exams that focus on functional areas of the trade as an alternative to the longer, more comprehensive, Core and Specialty exams. While both programs cover the same material, this new offering provides technicians with a more flexible path to training and earning certification.

The current collaboration is possible today because Interplay Learning's job-relevant virtual technical training aligns with NATE's goal to measure the onthe-job competency of technicians. Both organizations recognize that the intent is not to replace handson training but to offer a model of learning that promotes skill advancement and measurement.

Doug Donovan adds, "This flexible model supports hands-on training efforts and makes that time more valuable and efficient." He explains, "In a simulated training, you can practice hundreds of in-the-field scenarios in one session that might take years to see in the field." The 3D simulations and VR-based training reinforce and add to hands-on training, yielding job-relevant skills that pave the path to certification.

Through the micro-learning format, Interplay's accessible online training puts technicians in control of advancing their careers. NATE's matching CHP-5 certification exam series allows technicians to build skills and ramp-up credentials at higher rates than traditional pathways have allowed. Visit www. interplaylearning.com for more information.

NATE is also collaborating with the HVACRedu.net site on developing its online training presence. At HVACRedu.net, technicians can learn more about the NATE Certified HVAC Technician (NCT) program. It is a comprehensive online HVACR education program encompassing a well-rounded set of skills used by installers and technicians. It covers all the NATE Core areas with a broad selection of foundational courses, and then focuses on air conditioning.

HVACRedu.net's NCT Program is uniquely designed to teach foundational skills to individuals who have recently started in the profession. The program is also suited for non-certified installers and technicians who want formal education to upskill their knowledge and prepare for licensing or certification exams.

The HVACRedu.net site also has information on the NATE Ready-to-Work Program, which is structured to bring new technicians into the industry with all the required skills needed to start a career in HVACR.

For more information on the NATE Certified HVAC Technician offering, visit: www.hvacredu.net/nate-certified-technician/, and for information on the NATE Ready to Work Program offering, visit www.hvacredu.net/ready-to-work.

CareerStep (www.careerstep.com) has begun offering HVACR training through its collaboration with NATE. The firm has specialized in continuing education and training since 1992.

CareerStep provides the training curriculum through its education portal while NATE furnishes the testing through its LOP setup and in-person exams with NATE testing organizations. CareerStep's self-paced course offers a total of 430 study hours.

LIVE ONLINE PROCTORED EXAMS

Another new NATE online offering is its LOP exams. NATE now offers these remote exams for the EPA 608 exams, HVAC Support Technician Certificate exam, and the NATE Certification exams. The LOP exams give certification candidates the opportunity to take the tests from the comfort of their own home or office, at a time that fits their schedule.

NATE is providing this new format to help technicians complete their NATE Certification in a way that is most convenient for them. This LOP option will not replace NATE's in-person proctored paper-and-pencil and online exams that can be taken with one of NATE's Testing Organizations.

LOP exams allow test-takers the convenience of taking a NATE exam from their homes or offices using a computer, webcam, and stable internet connection. A qualified proctor will monitor the test-taker in real time using his or her webcam in order to ensure the integrity of the exam. Additionally, after the session is complete, a recording of the session is then reviewed. Trained professional remote proctors assure that remote testing is secure and trustworthy.

To get started, technicians simply log into their existing myNATE account at www.myNATE.org, or create a myNATE account. From there, they can access the LOP section of their myNATE profile. In that section, they can order and pay for which exam(s) they would like to take. After payment has been processed, they will receive an email with a link to schedule the exam with NATE's LOP service. For more information, visit: www.natex.org/LOP

Michael Keating is a contributor to the *NATE*Manazine.





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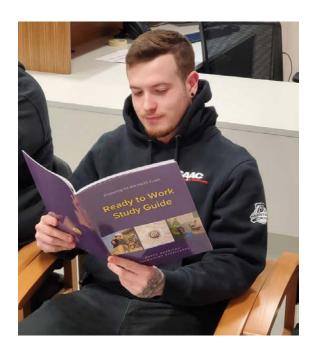


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NATE Study Guides Push Test Preparation to the Forefront



CREATING THE
NATE STUDY
GUIDES WAS A
COLLECTIVE
EFFORT BY THOSE
IN THE INDUSTRY
TO PROVIDE
INFORMATION TO
THE INDUSTRY'S
FUTURE.

hen it comes to testing and certification of HVACR professionals, NATE is the industry's go-to choice. But until recently, it was another story in terms of test preparation. Study materials produced by other organizations led to a number of issues, according to Gurminder Sidhu, NATE's senior director of business operations.

"NATE had no control of content and pricing of existing materials," she says. "Most technicians incorrectly assumed NATE produced test preparation materials, for example, the yellow RSES books, so any negative feedback was directed at NATE. Yellow books and other materials were longer and functioned more as textbooks than study guides."

Jose De La Portilla, national training manager at Samsung HVAC America and a member of NATE's technical committee, concurred that the manuals left a lot to be desired in terms of test preparation.

"For instance," says De La Portilla, "while RSES created a wonderful reference manual...it was essentially a college course on air conditioning. It was perceived as very difficult for techs to study with it because they didn't know where to start. Also, there were many fundamental concepts that may not have even shown up on the exam."

To address this situation, NATE decided to utilize the expertise of its technical committee to develop a number of its own study guides to help technicians and others in the industry adequately prepare for its certification exams.

"As a technical committee, we discussed it and thought, 'You know what? We really need to create our own study guides that are a little bit more concentrated on the core concepts of the exams,'" according to De La Portilla. "They help the individuals focus on the topics they really need to focus on when it comes time to testing and certification. The study guides whittle down that massive pile of data to a more comprehensible, more digestible set of knowledge skills that they will need to understand to take the exams."

FIRST STEPS

The NATE Board of Directors approved the study guides' project in the fall of 2018, and the team started development in the beginning of 2019, according to Sidhu. The team was comprised of the technical committee and the Learning Solutions group at Scantron.

"The Learning Solutions team mapped out the study guide based on the same job task analysis that was used to develop the exam," she says. "The job task analysis is a list of the job knowledge and skills needed to properly perform as an HVACR technician. They then engaged NATE's technical committee members and industry resources to develop the content of the guide. "

After the content was developed, the guide was written by the Learning Solutions team, while the technical committee reviewed the guide's versions as they progressed through many drafts.

Approving content required the consensus of the technical committee, according to Joel Owen, manager of the HVAC Training Center at Alabama Power and a member of the committee.

"Different folks may have worked on different areas. Then, the whole group would come together for test evaluation and discussion," he says. "We would ask: 'What goes on around that? And is that something that needs to be there, or is it outdated, or is there a better way to bring it out?' You kind of mash it all up and then come together at the end and decide, 'OK, this is good, this is not. This is a repeat from another section.'"

The different viewpoints and discussions helped tweak the content and made the guides a better product, according to Owen.

De La Portilla notes the committee members never really disagreed on what the answer was; they tended to disagree on the relevancy of a topic or how to get to the answer.

"Everybody looks at something from a different perspective," he says, "so what was great is we would sit down during multiple eight-hour sessions where we'd host a webinar and say, 'Here's this topic, here's the answer, here's how you explain it or teach it.' We would gather data from everyone, and on every question that I can think of, we came to a point where majority ruled."

Each study guide took about three months to produce, depending on the range of topics covered by each guide and the availability of subject matter experts, Sidhu says. The team at Scantron worked on one guide at a time. Once a guide was in review, that's when the team started working on a new guide.

One of the main efforts of NATE was to ensure that the guides did not mirror the exams too closely. This was something that was top of mind throughout the process.

"The Learning Solutions team at Scantron are experts at designing study guide materials that do not 'teach to the test,'" Sidhu says. "The Learning Solutions team had no access to the exam items while creating the guide to ensure the guide covers all the topics and not just those on the exams."

Not teaching to the test, according to Owen, helps the study guides stay relevant beyond the actual exam.

"Yes, it's a study guide that helps test-takers with the exam, but we're giving them information that will help them perform their job," he explains. "A test is one thing; hands-on performance is another. We're hoping in this process that we're giving them good information that will also help them in their day-to-day activities, rather than just that one time taking an exam."

ON OFFER

To date, NATE offers these guides:

 Ready-to-Work: launched in 2016; the Spanish version was launched in 2019





"THE LEARNING **SOLUTIONS TEAM** AT SCANTRON ARE EXPERTS AT DESIGNING STUDY **GUIDE MATERIALS** THAT DO NOT 'TEACH TO THE TEST.' [THEY] HAD NO ACCESS TO THE EXAM ITEMS WHILE CREATING THE **GUIDE TO ENSURE** THE GUIDE COVERS ALL THE TOPICS AND NOT JUST THOSE ON THE FXAMS."

-Gurminder Sidhu, NATE's senior director of business operations

- HVAC Support Tech: launched in 2016; the Spanish version was launched in 2019
- Core: launched November 2019
- Gas Heating: launched November 2019
- · Air Conditioning and Heat Pumps: launched January 2020
- Certified HVAC Professional: launched August 2020

NATE plans to update the guides every five years or so when the exams are updated. In addition, the group is considering releasing a study guide to go with any new exams that are created in the future.

"They're not going to be a one-and-done thing because technology in the industry is changing so rapidly," De La Portilla says. "We're going to have to keep going back and re-address these things on a regular basis to make sure we have the most current information about the current products and the things that the students will be seeing."

Sidhu says that feedback has been positive, with those who have purchased the guides highlighting the fact that they are shorter, simpler, and sleeker, as well as easier to follow. The large number of graphics and the practice tests at the end of each chapter also are popular additions to the guides.

GOALS AND BENEFITS

According to Sidhu, the study guides are a success in terms of meeting the industry's needs in creating a study guide that helps technicians prepare for the NATE exams. "NATE now has control over content and pricing," she says. "NATE produced materials designed as study guides—not textbooks."

They are shorter and more focused, as well as feature practice exam questions, more graphics, and updated content, Sidhu notes. "[The] goal was to create guides that technicians can use as a study prep guide, as well as a tool that they can use to help prepare for the exam by completing the practice exam questions," she explains. "Based on industry feedback, I would say those goals have been met. It's exciting to hear such great feedback on the study guides."

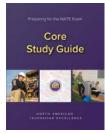
In addition, De La Portilla says he has heard from people in the industry that the guides are being used as curriculum for internal training for their own staff. "They might pull up a chapter and go through it in their Friday meetings to educate their maintenance, installation, and service staff before dispatching them out for the day," he says. "Because of the guides' small, modular format, it's very easy to do that."

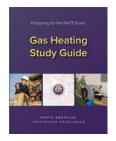
What makes them useful for trainers, De La Portilla adds, is that the guides are very logical in their flow: "They start with the theory, go into the fundamentals, go into the installation, then the operation, and finally the service. What really makes it a benefit for trainers is some trainers get a little overwhelmed with creating the curriculum. They can teach the content all day long, but these guides are in such a logical flow that it makes it easy for the instructor to say, 'OK, we're going to cover this today, this tomorrow, this next week."

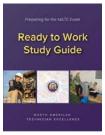
Owen sums up the study guide creation process by saying that it was a collective effort by those in the industry to provide information to the industry's future: "The study guides are for the folks coming in, so that they're able to comprehend them and be successful," he says. "At the end of the day, that's what we're after. We want these young men and women to be successful in the career they've chosen and feel good about what they've done and the choices they've made to be in the HVACR industry."

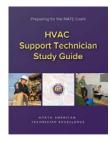
Elaine Yetzer Simon is a contributor to the NATE Magazine.















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HVACR **Contractors Achieve** a **Bounty of Benefits** Through NATE's C3 **Program**

CONTRACTORS TOUT THEIR HIGHLY VALUED NATE-CERTIFIED TECHNICIANS AND STRONG PROFESSIONALISM THROUGH C3.



ATE offers the Consumer Contractor Connection (C3) program that helps contractors gain access to new customers. The program also gives contractors a tool to demonstrate their firms' strong professionalism and commitment to the NATE certification program for their technicians.

With C3 membership, contractors can demonstrate their customer confidence and success, as well as their technicians' strong skill levels and the firm's competencies. C3 membership is designed for contractors of all sizes and specialties—ranging from one-person operations to businesses with multiple locations. NATE's C3 program is an efficient, effective way to let prospective customers know that NATE-certified technicians are on staff.

According to Anthony Spagnoli, NATE's director, Testing and Education, the C3 program offers contractors a free listing on NATE's Contractor Locator website, which receives 5,000 visits monthly. The listing enables homeowners and other consumers to quickly find a contractor that employs NATE-certified technicians.

"Additionally, contractors can use their C3 account on myNATE (www.mynate.org) to track their employee's certi-

fication status and Continuing Education Hours (CEHs)," says Spagnoli. "To participate, a contractor needs to have at least 25 percent of its technicians NATE-certified and complete an application on www. natex.org. Contractors may then register to be listed on the NATE Contractor Locator with their company information and the technicians' NATE ID

numbers."

ning PERI

"MORE AND MORE CUSTOMERS
SEEKING HVACR SERVICES WILL
LOOK TO NATE AS THE SOURCE FOR
THE BEST, MUCH AS THEY DO WHEN
LOOKING FOR CAR MECHANICS WITH
THE ASE-CERTIFIED LOGO."

-Neal Polycandriotis, HVAC Operations Manager at A.J. Perri, Tinton Falls, New Jersey

The C3 program was originally launched in 2006 as a listing service. Since then, NATE has added tools for contractors on the myNATE site to track their technicians' status and CEHs. Currently, there are about 5,500 contractors registered through the C3 program. NATE C3 Contractors also can display the NATE contractor logo on all of their firm's promotional materials.

Spagnoli says the C3 program can be a distinguishing factor for HVACR firms: "C3 participation and listing on the Contractor Locator boost contractors' visibility and reputations for competence. It separates these contractors from those that do not have certifications and cannot register for the listing."

The Contractor Locator site has been a motivator. Spagnoli says the C3 program has helped boost the number of technicians who achieve NATE certifications and helped drive new consumer business for contractors. "Some contractors have pushed their technicians to earn NATE certifications so they would be able to appear on the locator," he explains.

NATE IS PART OF THE EQUATION

"Being listed as a NATE C3 contractor is definitely a benefit," says Neal Polycandriotis, HVAC operations manager at A.J. Perri, Tinton Falls, New Jersey. A.J. Perri is an HVACR and plumbing contractor that has been serving New Jersey homeowners for more than 40 years. "As time progresses," he says, "more and more customers seeking HVACR services will look to NATE as the source for the best, much as they do when looking for car mechanics with the ASE-certified logo."

Polycandriotis adds that home comfort technology is becoming more sophisticated. "As systems get more complex, with the progression of smart home technology and higher performance efficiencies, customers will look

for companies that employ highly skilled technicians who are up to the task. NATE is synonymous with top skillsets and trained technicians."

Polycandriotis believes NATE C3 participation and listing on the Contractor Locator boost contractors' visibility and reputations for competence. "Currently, we have many NATE-certified technicians, myself included, who have seen the benefit of the improved reputation to both the contractors and the firm. In 2021, we plan to move toward full 100 percent certification and training in the company. You can't call yourself the best in the HVACR market without NATE being part of the equation."

Do consumers regularly use the NATE website to locate contractors? Polycandriotis says the answer is Yes. "It seems that every year, customers are increasingly turning to the internet to find the most reliable, top-quality expertise for help with all aspects of their lives, whether it be their cars, their windows, their computers and mobile devices, or in our company's case, their home HVACR, plumbing, and air purification needs. We strive to be the company that customers turn to when they are looking for the most highly trained and professional contractors. When it comes to our training and certification, NATE is an important part of our arsenal to deliver 100 percent customer satisfaction and peace of mind."

At NATE's Contractor Locator site, contractors can list and advertise their business for free. They can also spotlight the number of certified technicians on their staffs. All homeowners and other customers need do is key in the zip code of their residence. On a map of the customer's zip code, the Contractor Locator has symbols that show whether the contractor qualifies in one of the following three categories:

- As a Basic Contractor: 25 percent of eligible technicians are NATE-certified.
- As a Standard Contractor: 50 percent of eligible technicians are NATE-certified.

As a Quality Circle Contractor: 75 percent of eligible technicians are NATE-certified.

The three levels are designated by color-coded pins on the zip code map at the Contractor Locator site

A wealth of information is offered for each firm listed in NATE's Contractor Locator site. It offers the contractor's mailing address, phone number, email, and website address. At the Show More tab, there are additional contact points, including distance from zip code in miles; special offers and promotions available from the contractor; company description and overview; and names of manufacturers whose equipment the contractor services and repairs.

Registration at the C3 site is an ongoing process rather than a one-time activity. Once the C3 registration is approved, the primary contact is sent an email with instructions on how to create an account at the MyNATE portal, www.mynate.org. As the business evolves (address changes, website address updates, phone number changes, for instance), the primary contact can log in to update the firm's contact points and information.

Most importantly, as a contractor hires more NATE-cer-





tified technicians or has more of its currently hired technicians achieve NATE certification, the primary contact can log into the portal to update that information, which may change a contractor's status among the Basic, Standard and Quality Circle levels.

A supplemental benefit of listing a contractor's technicians in the C3 registration is that the primary contact

can view the certification status of each technician listed, including certifications achieved, certification expiration dates, and the number of training hours documented for recertification. This enables many contractors to assist their technicians to stay current on their recertification efforts and tasks. What's more, the contractor's primary contact can download the firm's listing to a report in Excel, PDF, or a Word document for convenient viewing.

NATE C3 contractors also can display the NATE contractor logo on their firms' promotional materials. Contractors have a variety of other ways to promote the importance of NATE certification. These include placing the NATE logo on truck fleets and touting NATE certifications in social media, as well as in print publications and advertising.

The C3 program and NATE's Contractor Locator site are user-friendly resources that help homeowners and other consumers locate professional and highly certified HVACR technicians and contractors.

For more information, visit this site to view NATE's Contractor Locator: www.natex.org/site/456/Homeowners/Find-a-Contractor-with-NATE-Certified-Technicians

Go to this site for more information on the C3 program: www.natex.org/site/395/Contractors/Consumer-Contractor-Connection-C3

Michael Keating is a contributor to the NATE Magazine.

ONLINE PROCTORED EXAMS



NATE exams now available online!

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Live Online Proctored Exams give technicians the opportunity to take their exam from the comfort of their own home or office, at a time that fits their schedule.

This live online proctoring option will not replace our in-person proctored paper and pencil and online exams that you can take with one of NATE's Testing Organizations.

For more information or to register for an exam visit:

NATEX.org

NATE is the leader in developing and recognizing professional HVACR technicians.

North American Technician Excellence (NATE) is the largest non-profit certification organization for heating, ventilation, air conditioning and refrigeration technicians.

Meet Your NATE Board Members

PROFESSIONALS FROM ACROSS THE SPECTRUM OF THE HVACR INDUSTRY GUIDE THE DIRECTION OF NATE.

THE NATE BOARD OF DIRECTORS INCLUDES A DIVERSE RANGE OF PROFESSIONALS IN THE HVACR INDUSTRY. IN THIS ARTICLE, WE INTRODUCE YOU TO A FEW OF THE MEMBERS CHARGED WITH DIRECTING THE FUTURE OF THE ORGANIZATION



president of business development for Johnstone Supply. a wholesale distributor to the HVACR industry based in Portland, Oregon. He holds numerous coaching certifications. Dier joined the company in 2000 as business operations manager. In 2004, he was promoted to senior consultant within the organization to serve as liaison between the Johnstone Supply team and 50 member businesses. He assumed his current role as vice president of business development in 2010. He oversees Johnstone University, a training and certification program that serves nearly 20,000 users, as well as the company's Insight Sales Program.

Kevin Dier is vice



Brent Schroeder

is group president, Heating and Air Conditioning, for Emerson Commercial and Residential Solutions, St. Louis. He is responsible for Emerson businesses serving the HVACR industries with revenue in excess of \$2 billion. After graduating from Ohio Northern University, Schroeder joined

Therm-O-Disc, a subsidiary of Emerson Electric in Mansfield, Ohio, as a sales engineer. He was promoted to president of Emerson's Fusite division in 2003, and held that position until 2006. He then returned to Therm-O-Disc as president, where he served until joining Emerson's Air Conditioning Business as president in 2008.



Bradley Snyder

is senior vice president CEO staff and executive advisor for Goodman Manufacturing, a producer of HVACR equipment, based in Houston. He joined the company in 2007 and has held numerous positions since then. Snyder came to the HVACR industry from the home appliance industry, where

he worked for Whirlpool Corporation for 14 years. In 1999, he joined Lennox in its Lennox Retail Group, which evolved into Service Experts and where he served as regional vice president for the eastern half of the U.S. In 2003, he joined Michelin NA, as senior vice president of sales and marketing for its subsidiary, TCI.



Trademasters Service Inc., a
full-service HVACR contractor
based in Lorton, Virginia.
He started the company
in 1990. "Since then, our
commitment to excellence
has earned us the Air Conditioning Contractors of America
2018 Commercial Contractor of
the Year award," he notes. Kyle also
was named Small Business Person of the

Year for the Northern Virginia region and state of Virginia in 2018. "Although our success could not have been reached without our incredible coworkers, it is nonetheless something that I am grateful to have received."

A SHARED VISION

The board members agree that the education and certification NATE offers benefits all industry stakeholders. Dier says that NATE certification is a win for everyone in the industry. "It is good for manufacturers and distributors because it reduces warranties and other installation issues. It is good for contractors because it creates a reliable standard of excellence for their technicians and installers. It is good for homeowners because they benefit from having more efficient HVACR systems installed or serviced by a NATE-certified provider."

Synder stresses that proper service, diagnosis, and installation are paramount to equipment performing to its intended levels. "From both a consumer and manufacturer perspective, NATE certification can help provide the confidence that service and installation are performed at the highest standards. As equipment evolves and consumer expectations deepen, NATE certification will continue to play a significant role going forward."

Kyle says that Trademasters Service's partnership with NATE has been a catalyst in the company's growth. "Our commitment to best-in-class service had to be clearly demonstrated to the marketplace, and we achieved that in large part by requiring the highest levels of certification (via NATE) for all of our technicians. That decision augmented our ability to attract top-tier talent and forge the highest level of trust with our customers."

Schroeder notes that the future of HVACR is full of uncertainties: new regulations, new products, and new realities. Thus, it is imperative that technicians receive NATE training and certification so they can install and service systems that meet new efficiency and refrigerant regu-

lations with confidence. "Comfort and energy savings are more important than ever with homeowners and commercial building owners."

The four board members agree that NATE's recent introduction of Live Online Proctoring (LOP) will benefit technicians and contractors. Snyder says that LOP is a necessity and especially timely in the environment we find ourselves in 2021. "The stressors created from COVID-19 on technicians, contractors, and the sales, service, and installation process are tremendous. LOP helps relieve one of the pressure points to allow ongoing education and certification."

Live Online Proctoring also represents NATE's commitment to attracting new people to the industry and acknowledging the growing digital generation that now encompasses a major part of the workforce, according to Kyle. "To the technician, it means more flexibility to meet busy schedules and makes certification more attainable than ever."

NATE's new pathway to certification, the Certified HVAC Professional (CHP-5), gets rave reviews from the new board members, as well. "The new process allows technicians to take the exams at their own pace. This is especially important given the technician shortage in the industry; it shows that NATE is aware and has made changes to accommodate the situation," Schroeder says.

CHP-5 is another example of NATE's forward thinking that accommodates the way the workforce learns, Kyle adds. "By segmenting certification into easier-to-digest modules, it opens a window to focus on the subject matter in a more meaningful way. The once-daunting prospect of attaining certification in one giant leap can now be achieved with stepping stones and, in turn, contributes to attracting new people to the industry."

LOOKING AHEAD

Chairman Dier says NATE is positioned to make even more improvements in serving the HVACR industry over the next two years, despite challenges that include a shortage of qualified workers. With the shortage of talent coming into the trade and the exodus of experienced techs, contractors are struggling to find talent and grow, he admits.

"NATE's vision is to be the leader in developing and recognizing professional HVACR technicians," says Dier. In the past, he notes, the focus has been on certification and recognition. It is only in the last two years that NATE has expanded its focus to developing professional technicians.

"We will continue to focus on providing technician training, through our partners, to prepare technicians for their role," explains Dier. "We will also continue to offer digital solutions, such as online proctoring of exams and our online store. We will continue to raise awareness and encourage adoption of NATE's CHP-5 framework as the industry standard for training and certification."

Neal Lorenzi is a contributor to the NATE Magazine.

WORKING TO PROMOTE NATE CERTIFICATION

The NATE Board of Directors—comprised of the Executive Committee and Board of Trustees—is composed of 14 members. Additionally, NATE relies on the expertise of its Advisory Council, composed of eight members.

The NATE Board of Trustees is led by the Executive Committee, which is made up of the Chairman, Vice Chairman, Secretary/ Treasurer and Parliamentarian. The parliamentarian position is held by NATE COO John Lanier.

The Executive Committee is responsible for making strategic decisions for NATE in between Board meetings. The Chairman leads the meetings of the Board of Trustees. and the position is a two-year term. The Executive Committee meets before each Board meeting to review the agenda and NATE finances.

The Board of Trustees is made up of nine to 15 members. Trustees have a two-year term, are nominated by the Chairman, and are confirmed by the Board of Trustees. The Board strives to include representation from all corners of the HVACR community, including contractors, manufacturers, wholesalers, and educators. Board members quide NATE's focus and long-term strategy.

The Board meets twice a year, in the spring and fall. Usually, the meetings are held at the NATE office in Arlington, Virginia. This past year, both Board meetings were held remotely because of COVID-19.

The Advisory Council is made up of the past Executive Committee Chairmen. While the Advisory Council does not meet regularly, the Board will reach out to them to tap into their experience and expertise.

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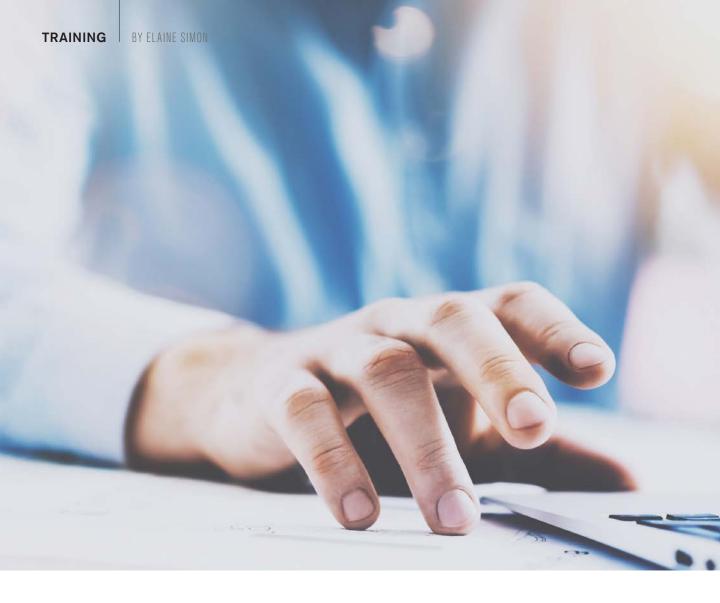






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Emerson Fills Industry Need for Updated Training

WHITE-RODGERS AND NATE COLLABORATE
TO ENSURE NEW EMERSON ONLINE
TRAINING COURSES SUPPORT NATE
CERTIFICATION CREDITS.

he changing business environment caused by COVID-19 has led many companies to circle the wagons and focus inward, but Emerson Electric Company took a different approach—taking stock of what its partners and the industry at large needed and meeting that need.

Emerson, which manufactures a variety of heating, air conditioning, and refrigeration components and systems, took advantage of the unusual times to focus on training. The company's White-Rodgers brand builds a number of aftermarket parts, both universal replacements as well as OEM direct replacements. The company also offers several direct-to-consumer products, such as the Sensi thermostat.

"Last year ended up being the perfect storm with COVID and with so many people working from home, even technicians," says David Vie, director-electronic controls for Emerson Commercial & Residential Solutions' White-Rodgers division.

According to Vie, that caused customers to request



training to help fill employees' time when they were unable to go out on jobs.

"We really tried to accelerate our efforts and take advantage of these opportunities because we really had people pushing us for help," Vie says.

The training focus was two-fold, according to Tipper O'Brien, channel marketing team lead for Emerson Commercial & Residential Solutions. "We've sort of moved into the 21st century, if you will, by cleaning up some of the older Flash-based content that we had that was difficult to view," he says. "Then we created additional trainings, 10 over the past six or seven months, and we'll put out another 15 [this year]."

WHY A FOCUS ON TRAINING

O'Brien and Vie both stress how important training is for those at all stages of their HVACR career.

"We know there is a shortage of individuals who are going into the trades, specifically into HVACR," O'Brien says. "We also know how important it is to provide training,

not just for people who are starting out, but also ongoing training for folks in the HVACR business. We focus on universal controls, and clearly that is a product set that requires a little bit more knowledge than direct replacement parts because it's not always as easy as just seeing what the existing installation is and then just subbing in something new. Oftentimes, you need to more fully understand the installation."

There has always been a need for training in the industry, according to Vie, and that's being accelerated by industry turnover: "It feels like most of the anecdotal evidence you see notes that we're losing our senior technicians and a lot of the folks with experience faster than we're bringing in new folks," he says. This problem is compounded by the fact that products are becoming more complex and more difficult to troubleshoot.

"You don't have to go too far back in the past when things were much more straightforward—one- and two-stage systems with fewer capabilities," Vie says. "It's great that we have all the new efficiency and all the cool new features, but with that comes a lot of complexity and need for training."

The additional training also benefits Emerson, and White-Rodgers specifically, because of its goal to create novel products and universal options. Vie highlights universal furnace control boards, for example.

"Our customers love the ability to be able to truck stock a product, be confident when they get to the service call that they've got the part they need. But, they're more complex than a direct replacement board, where you just take out the existing board and drop in a new one," he says. "You've kind of ratcheted up the level of complexity. We feel it's important to not only offer the product but also the training so that people are comfortable with our products and want to use them."

WHAT AND HOW

One of the first issues the company had to tackle when it started the training update process was what format it was going to take.

"Different people have managed [training], different level of expectations. In the past, a basic PowerPoint was good enough," says Vie. "Well, now everything's changed. People want online training. People want videos. They want things that they can click through, understand, and digest rapidly."

O'Brien says they looked at the training that existed at White-Rodgers Education Central, which is housed on the BlueVolt learning-management system. That content was a few years old and needed brushing up. That led to the creation of the new courses. Multiple teams throughout the

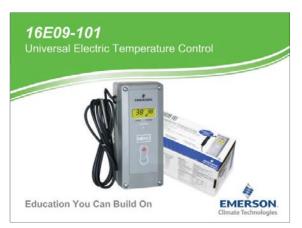
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company participated in the content creation portion of the project, including the product and sales teams.

The company also reached out to senior members of its sales force to find out what training topics they were interested in seeing, as well as contacting contractors directly for their opinions on training topics and formats. They also discussed what tools contractors would

like to use for training so that Emerson was meeting those needs.

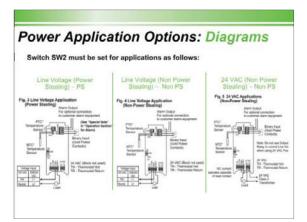
"It's a very long process with a lot of moving parts. Many people are involved in it, and there are a lot of steps," O'Brien says. "Also, there are pass-throughs from one group to the other to check each other's work and to make sure that everything is accurate and conveyed

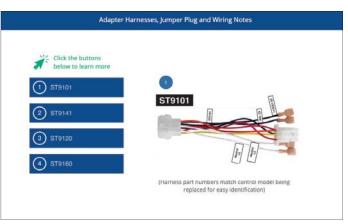












White-Rodgers updated and created new courses to ensure that Emerson was meeting the training needs of contractors and technicians.

in the most direct and creative way. I think that is what has made the work that much better in the end."

O'Brien explains that each course is broken into three areas that are applicable to a different group.

"We have the value proposition of the product," notes O'Brien, "which is information for the distributor and contractor that gets at what the replacement market looks like and what the cross-reference is for each of the products. It gives you an idea of what the value is for each of those groups. We also have the technical piece. This is more engineering-specific—how it was built, why it was built, what it offers, and what the features and benefits are. Just kind of the real nuts and bolts of how it works."

The final part of every course is the installation portion, which leans heavily to video content and step-by-step photography that shows technicians how that tool is installed.

"[We include] some stuff that falls into the frequently asked questions category, as well as things we know that can be a stumbling block that we get questions about all the time," says Vie. "We try to pre-answer those questions."

Each course runs between 15 and 30 minutes, depending on the individual's pace and the complexity of the subject. The most consumed courses include ones on Emerson's universal fan timer and universal heat pump defrost controls, as well as thermostat courses.

Looking forward, the company is focusing on the next heating season, Vie says. "Our mission now is looking six months ahead. We're going to have a couple of new products, so we know we need to support that. We know we've got some existing products that we want to do more on. The goal is to have all of that ready by June or July so people can avail themselves of that training as they transition out of the summer cooling season and before the fall and winter heating season really hits them."

The training courses are free of charge for anyone who is interested at *https://go.bluevolt.com/whiterodgers*. Videos and other training content from Emerson also are on YouTube, in case a technician has a question while out in the field and needs to do a quick search to solve an issue.

"It's for our salespeople, our distributors, our contractor owners, and for technicians," O'Brien says. "It's for anyone in the industry who wants to bolster their understanding of our products and HVACR tools. We want to be in as many places as people need us throughout the process."

NATE INVOLVEMENT

White-Rodgers and NATE have had a long history working together, according to O'Brien, which naturally led to the companies partnering on certification for the new courses.

"When we went back, sort of brushed off our toolbox and took a look at what we were doing, we knew that NATE had to be a part of that," he says. "We really wanted to offer a utility for people who are coming to take our product training. There are multiple places that folks can go to get that training, but there are, I would say, comparatively few where individuals can go and get that training online and get NATE certification credits for doing so."

In addition, contractors in the industry made it clear that NATE approval was a must. O'Brien says, "Our focus on NATE was based on customer research and understanding that it wasn't going to be enough just for us to offer course content. We had to make sure it was approved by NATE to offer that utility for people."

Vie concurs: "We recognize that NATE approval is the industry standard of what people want for training."

Elaine Simon is a contributor to the NATE Magazine.

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