

# REHVA Task Force Guidelines & Template

How to gather and coordinate experts to publish REHVA guidebooks and other technical documents

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## 1 What is a REHVA Task Force?

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### Aim

A REHVA Task Force (TF) aims to collect/generate knowledge to support and update HVAC professionals on a well-defined topic. The result of this work describes the broad consensus among volunteer experts on the issue tackled. A key role of REHVA Task Forces is to develop knowledge products that are published and sold by REHVA.

The fundamental goals of each REHVA Task Force are:

- to disseminate and promote harmonised knowledge on indoor climate management, HVAC technologies and design for healthy and energy efficient buildings,
- to advance the science of HVAC and indoor climate management in buildings,
- to disseminate and exchange technical information,
- to develop and update technical guidelines and normative documents.

### Composition of a Task Force

A Task Force is an international team of HVAC and building experts that works under the supervision of the REHVA Technology and Research Committee (TRC) on a proposed topic or task of joint interest. Task Forces represent REHVA Member countries from at least three different climatic and cultural zones within Europe. TF members are volunteers who commit to work on a certain topic of joint interest approved by the TRC. TF members of REHVA Member Associations (MAs) shall be officially delegated by their respective associations.

A Task Force can invite also external experts (i.e., not affiliated to a REHVA Members Association) on a certain topic, including representatives of [REHVA Supporter Companies](#) and Associate Organisations. External experts, including representatives of [REHVA Supporter Companies](#) and Associate Organisations, may also propose a new Task Force, provided that REHVA is sufficiently represented in the TF by leading experts as co-chair or an active member. External Experts are required to actively communicate and cooperate with the involved Member Association representatives and report to the TRC.

Each Task Force shall have active members (delegated by MAs) from at least three different REHVA member countries. This also applies for external experts that aim to propose a new Task Force.

### Establishment of a Task Force

The Task Force topic, Work Plan, chairpersons, and contents must be approved by the Technology and Research Committee (evaluation of the technical content, relevance of the topic and added value to HVAC profession) and Publishing and Marketing Committee (PMC) (evaluates the relevance, market demand & market potential of the planned outcome).

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## 2 Task Force outputs

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The work of a Task Force can result in different types of outputs:

- pre-normative work and support to standardisation activities, guidelines, case studies, country-by-country analysis etc. (technical report)
- a consensus document on engineering practice (REHVA Guidebook)
- digital knowledge sources and tools: digital calculation & information tools, online tutorials, recorded presentations & expert talks, infographics, fact sheets, etc.
- Course materials & online courses

- White papers

While guidebooks may be a standalone outcome, REHVA aims at combining these with the other digital tools listed above for improved and better tailored knowledge dissemination, as well as supporting the marketing and promotion of the guidebooks. REHVA also encourages the development of training materials and online courses based on the guidebook content in a systemic way to diversify the offered products. A course may also be a standalone outcome of the TF work as well.

Table 1 summarises the typical<sup>1</sup> features of the three publication options.

*Table 1. Possible features of Task Force publications*

	REHVA Guidebook	Technical report	Course materials	Digital tools & video sources
Goal	Provide EU level harmonised and practical guidance and state-of the art knowledge based on the broad consensus of professionals (often based on norms and standards)	<ul style="list-style-type: none"> <li>• Focus on future technology and HVAC-system development</li> <li>• Pre-normative work that support standards and future guidebooks</li> </ul>	Develop practical, short online courses ad training materials (3-6h)	Develop user-friendly online tools & video tutorials explaining a specific technical information linked to GB topics or standalone
Contents	European engineering practices, how to apply knowledge into practice (good case studies are requested)	Collection of basic design and calculation principles or country specific information	Curriculum, course materials, assessment materials, assignments	Digital tools, checklists, process flowcharts, calculation tables, etc. with written or recorded video explanation how to use them linked to GBs or standalone
Publication format	Printed and/or Digital	Digital	Digital	Digital
Target audience	<ul style="list-style-type: none"> <li>• practitioners in in building &amp; HVAC sector (e.g. designers, manufacturers, investors, facility managers, occupational hygienists, building owners, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• practitioners in building &amp; HVAC sector</li> <li>• academics</li> <li>• students</li> <li>• public authorities</li> </ul>	<ul style="list-style-type: none"> <li>• practitioners in building &amp; HVAC sector</li> <li>• academics</li> <li>• public authorities</li> </ul>	<ul style="list-style-type: none"> <li>• practitioners in building &amp; HVAC sector</li> <li>• academics</li> <li>• students</li> </ul>

<sup>1</sup> The actual features of each publication are very much content-dependent and have to be agreed with TRC and PMC.

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### 3 How to establish a REHVA Task Force

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To establish a Task Force, the interested expert who commits to lead the work must submit their Task Force proposal to the Technology and Research (TRC) and Publishing and Marketing Committee (PMC).

The process to establish a Task Force has two stages. The TRC is involved in both stages while the PMC evaluates it on stage 2. The final formal decision is taken by the TRC after consulting the PMC.

#### 1) Presentation & approval of a TF topic by the TRC meeting

The TF chair presents and discussed a proposed topic with TRC members. The TRC approves or rejects a topic. If the TRC approves a TF topic, it invites the TF to elaborate a Work Plan to assess the planned outcomes from a scientific and marketing point of view.

#### 2) Submission & approval of a TF Work Plan

The TF represented at least by its chair(s) must submit a Work Plan according to the REHVA Task Force Guidelines & Template. The TRC & PMC secretaries evaluate if the submitted Work Plan complies with all requirements and may ask modifications from the TF before putting it for approval on the respective committee's agenda. Once the Work Plan is formally accepted by the secretariat, the secretary puts it on the next meeting agenda of the respective committee. The assessment of the planned outcomes from a scientific and marketing point of view happens in the following steps. The TRC and the PMC may both comment and ask for the revision and resubmission of the Work Plan based on the received comments. If this is the case, the process unfolds in similar decision rounds until the final approval.

- Submission and eventual re-submission of the Work Plan to the secretariat
- Presentation of the Work Plan by the chair, discussion & approval by TRC members with focus on the scope and technical content
- Presentation of the Work Plan by the chair, discussion & approval by PMC members with focus on the market need & potential.

The TRC & PMC decide in consultation about the output type and format (guidebook, technical report, other material) based on the Work Plan.

### 4 Requirements for the TF topic description & the TF Work Plan

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To standardise the evaluation and work process, REHVA updated this guidance and developed a template for the Task Force idea description and the Work Plan with the aim to develop new type of knowledge materials beside guidebook, specifically online and digital products as possible outcomes of Task Forces.

#### Task Force Idea description (stage 1)

The short description of the idea and a presentation should be submitted to the chair of the TRC committee via the TRC secretariat ([pcm@rehva.eu](mailto:pcm@rehva.eu)) who puts the point on the following meeting agenda and invites the chair to the meeting to present the proposed topic. The idea description should contain the following:

- the topic and scope of the TF;
- name of the chair(s);

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- justification why REHVA should work on this topic;
  - reference to related REHVA guidebooks or publications (if applicable);
  - geographical / climate zone coverage (which countries, minimum 3);
  - possible members & the profile of experts sought;
  - expected output;
  - indicative duration of work.

### Task Force Work Plan (stage 2)

The Work Plan must comply with this guideline and follow the [Task Force Work Plan Template](#). The TF is requested to think beside the technical scope and content, also about the targeted audience and the market potential of the planned outcome and should consider similar publications or products that are available in the market.

The TRC & PMC secretaries evaluate whether the submitted Work Plan complies with all requirements and may ask modifications from the TF before putting it for approval on the respective committee's agenda. Once the Work Plan is formally accepted by the secretariat, the secretary puts it on the next meeting agenda of the respective committee.

The draft Work Plan should be submitted to the chair of the TRC and PMC, via the TRC secretariat ([pcm@rehva.eu](mailto:pcm@rehva.eu)) within three months after the idea is approved (stage 1). If this deadline is not met, the TF idea will be considered as dropped and will be removed from the TRC activity plan and TF status list.

## 5 Task Force work, reporting to the TRC, peer review and approval of the final outcome

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Task Forces should periodically report at TRC meetings about the work progress and eventual changes in the Work Plan. In case the initial Work Plan changes significantly, the TF must re-submit the revised Work Plan to the TRC & PMC for a new approval.

Task Forces are welcome to convene working group meetings or workshops during or in connection with major international conferences, to discuss the draft before it is finalised and prepared for peer review. The TRC offers some budget to organise meetings, but the availability of funds would be planned well in advance and approved by the REHVA Office. The internal complete draft document should be circulated among all TF members before the submission to peer reviewers.

In case the outcome of the TF work is a guidebook or a technical report, at least three peer reviewers shall review the final draft. Reviewers should be proposed and approved by TRC. If the initially identified reviewers are not available, TF chairs should inform the TRC and propose new candidates for approval before proceeding with the review. The TRC may also nominate new experts for the review. It is the TF chair's role to communicate with the peer reviewers and coordinate with the TF member that the comments are addressed. The TRC secretary should be kept in the loop of the final review process and may assist the TF chair as needed. The received comments should be sent also to the TRC member via the TRC secretary. Once the review is completed, TF chairs and the TRC shall ensure that review comments and concerns are considered in the final document. The final draft of a guidebook must be approved by the TRC before it is sent to English review and typesetting.

In case the outcome of a TF work are digital tools, training materials, videos or other online knowledge sources, the TF should propose 2 peer reviewers who may be the TRC chairs. In these cases, the review process is simplified. The PMC and the REHVA staff will assist the

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review, edition, and production of such outcomes.

If the outcome of a Task Force work includes a Position Paper or a policy recommendation, the relevant decision-making process must be followed (beyond the scope of this guidance).

## 6 Publication of guidebooks and technical reports

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The publication process is overseen by the PMC and the PMC secretary ([mj@rehva.eu](mailto:mj@rehva.eu)).

REHVA has non-exclusive rights to the results of Task Forces and exclusive publication rights to the products of the Task Forces.

It is the TF chairs responsibility to establish and confirm the copyright status of all graphs and figures used in the guidebook, to apply the copyright references and if necessary, ask the approval of the author to use her/his intellectual property (IP). REHVA by default aims to use graphs and figures of the authors with their knowledge and approval that are free of charge. In case this is not possible, the TF chairs should inform the REHVA office via the PMC secretary to identify a solution.

### English review, typesetting, publication

- After the final draft of a guidebook or technical report is ready, the PMC secretary handles the process of the English review in cooperation with the TF chair. The TF chair has two weeks after the review is done to correct eventual comments and approve the final EN manuscript before it is sent for typesetting.
- Once the EN review manuscript is approved by the TF chair, the PMC secretary starts the typesetting, which usually takes 4-6 weeks. The TF chair should be available for eventual questions and comments by the typesetter. The TF chair has 2 weeks to review and approve the typeset, print ready manuscript (pdf).
- After the typeset print ready manuscript is approved, the PMC secretary arranges the printing of the paper books (in case there is a printed version) and prepares the pdf book for launch in the REHVA eShop. REHVA aims at launching new guidebooks and reports at the major REHVA events (Annual Meeting, Brussels summit, CLIMA), where TF chairs are invited to present the guidebook.

### Sales and promotion of guidebooks and reports

- The TF chair prepares a PowerPoint presentation about the content of the publication using the official REHVA presentation template. TF chairs and members are invited to support the REHVA office in the promotion and marketing of the guidebook they authored
- Guidebooks/reports will be edited, published, circulated, and sold by the REHVA secretariat. All REHVA Member Associations and Supporters will receive one free copy of each new Guidebook.
- Authors will receive 3 honorary copies and reviewers receive one honorary copy of a printed guidebook/report. All parties receive one digital copy, in case it is only a PDF book.
- PMC sets the pricing and marketing policy of the publications.
- REHVA Member Associations receive discounts for the resale of guidebooks/reports.
- REHVA Member Associations receive discounts for the translation rights to create a national version of guidebook (copy of original guidebook but translated to national languages).

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- The guidebooks can be sold directly to educational institutions (students) at a significantly reduced price.

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## 7 TASK FORCE WORK PLAN TEMPLATE

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Please follow this template for the description of the TF Work Plan.

### [Name of the Task Force]

Please, make sure that the name of the task force accurately describes the scope and does not overlap with the scope and title of the existing TRC task forces. (A list of the active task forces is available on the [REHVA website](#)).

### Task Force chairs and members

Please fill in the table below regarding the task force chair, co-chair and participating members. If you seek more members, please, describe the profile of the sought experts. TF members shall cover at least 3 REHVA member countries and include member associations representatives. Consider inviting representatives of [REHVA supporter companies](#) as external experts whenever possible to ensure that the outcome is practice and market oriented. The list of supporters is available on the [REHVA website](#). Add/delete table rows, as necessary.

Title	Full name	Affiliations	Email address
Task Force chair			
Task Force co-chair			
Member			
Member			
Member			

### Scope, objectives, and justification of the Task Force

Please summarise the scope and objectives of the TF. Explain why REHVA should tackle the related topic. Justify what added value the outcome brings to the target audience, what kind of knowledge/practical gaps is intending to fill and justify why this topic is relevant. Consider that REHVA publications and knowledge sources target practitioners and should be suitable for practical application. [max. 400 words]

### Target audience(s)

Describe the target audience(s) of the planned TF outcome. Justify why it is suited and relevant for the specific audience. Please support your arguments/opinion by including references and links wherever possible.

### Description and justification of outputs

Describe the planned outcomes of the TF according to the explanation in chapter 2 of this guide. Consider a combination of different possible outputs to increase the impact (e.g. guidebook and a digital calculation tool/infographic, recorded course. REHVA encourages the development of training materials based on guidebook content.

Example of outputs: HVAC design guide (guidebook), technical, comparative analysis of national building policy or HVAC engineering practice, online calculation tools, training material, course, other online information tool (infographic, checklists, data tables), etc. [max. 300 words]

### Structure or Table of Contents of the outcome

Please, summarise the draft content, in case the output is a guidebook, a technical report or a manual. Explain the intended scope and content of each listed point and define the maximum length

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of each chapter. The preferred guidebook length is below 80 pages including all graphs and figures, and the outcome should not exceed this length. In case the outcome is other than a book, please list and describe the related structure and content part, indicate volume, format and main characteristics.

#### TABLE OF CONTENT

Chapter 1 (length in pages)

[scope and resume]

Section 1

Section n

...

Chapter n (length in pages)

[scope and resume]

Section 1

Section n

Annex I (length in pages)

description

### Market analysis and market potential

Please provide information about the state of the art and any similar products available in the market within the field tackled by the TF and how these compare to the TF outcomes. Are there similar publications/tools/courses etc. available that cover already this topic? If yes, explain the added value of the planned outcome compared to these competitors.

Please describe who are the key potential customers of a publication or course material. List organisation, companies, or sectors that would buy the outcome product. Estimate the size of the market and the number of individuals / companies to whom the outcome is relevant and appealing. Could the members of the task force assist REHVA to reach this audience? Are there any specific companies that would be interested in this topic?

Please, support your arguments/opinion by including references and links (where possible).

### Indicative timeline of the work and resources

List and schedule (month and year) the main stages and milestones of the planned work. In case the outcome is a publication, estimate the time when the final draft can be ready for the external review.

Schedule the TF meetings (especially if you plan a physical meeting), indicate if you need organisation and travel costs reimbursed, and estimate the related cost.