



California Chapter of the
Building Commissioning Association

Business Plan

Fall 2011

Executive Summary

Introduction

The California Chapter of the Building Commissioning Association is a nonprofit professional association of the Building Commissioning Association.

The association and chapters are organized to improve and further the practice of building commissioning, and through its professional development programs, marketing efforts, policies, and activities, enhance market opportunities and business conditions for building commissioning.

Organization

The California Chapter of the Building Commissioning Association was founded in 2010 with California members in the Southwest Chapter of the Building Commissioning Association. The management team consists of the board of directors and officers.

Services

The California Chapter of the BCA will provide a variety of services to the California commissioning industry including the scheduling and coordination of activities and events. These include meetings for networking, webinars, educational seminars, annual meetings and social events. In addition, we plan to provide career opportunity announcements, social networking, events and various announcements related to the commissioning industry.

Market Analysis

The building commissioning industry continues to grow at a steady pace with more firms entering into the market as the demand for commissioning services increases. Initially, the new construction commissioning market developed due to various sustainability rating systems such as Leadership in Energy and Environmental Design (LEED) where commissioning of building energy systems is required for certification. Subsequently, existing building commissioning is being implemented as mandates and incentives for energy efficient and high performance buildings as demand increases. With the inclusion of commissioning in building codes and standards, it appears the need for a local industry association is warranted and the membership will continue to grow.

Financial Considerations

The main strategy for financial growth is through membership, fundraising, and chapter events. Membership dues and other services is expected to raise approximately \$4,000 the first year to over \$6,000 the third. Net surplus is estimated to rise slowly but steadily over the next three years. Cash flow is expected to remain healthy and our main financial focus is to remain solvent. Any surplus funds may apply to marketing activities, educational scholarships, chapter activities, speaker expenses, etc.

Organization

1.1 Vision

Become the preeminent building commissioning organization in California and enrich the proficiency and practice of members of the Building Commissioning Association and the public.

1.2 Mission

The mission is to improve and further the practice of building commissioning, and through its professional development programs, marketing efforts, lobbying activities, and the creation of economic and business conditions for building commissioning.

1.3 Objectives

The objectives outlined below represent the initial objectives set forth by the foundation board and are initial Chapter objectives. Objectives will be revised yearly based on Chapter needs, requirements, input from members, the board of directors and the elected officers.

1. The Chapter will conduct four member meetings during the first year, six member meetings the second year, and continue to increase the number of monthly meetings to serve the needs and desires of our members.
2. Retain all our seventy-seven members for Year 1 and increase to one hundred members for Year 2.
3. Increase our net annual income of approximately \$4,000.00 to \$6,000.00.

1.4 Organization Summary

The Building Commissioning Association (BCA) is a non-profit trade association for individuals and companies interested in building commissioning. The association seeks to enhance quality standards throughout the industry by developing best practices doctrine and educational programs. The Building Commissioning Association is comprised of local chapters and the International Building Commissioning Association, which oversees the chapters. The BCA chapter has the responsibility for conducting local activities, which extend Association benefits to members in the area. BCA will develop services, which permit chapters to carry out their functions with maximum efficiency and effectiveness.

1.5 Management Summary

The initial management team consists of the board of directors and elected officers. Once the Chapter is chartered by the BCA the Chapter will be managed according rules and guidelines set forth in the BCA Chapter Handbook and directives of the BCA management.

1.6 Legal Entity

The California Chapter of the Building Commissioning Associations, Inc. is a California nonprofit 501(c)(6) corporation.

1.7 Organization History

Founded in 2002, The Building Commissioning Association formed a national organization with six regions with a Chapter in each region. The regions include Central, Mid-Atlantic, Northwest, Northeast, Southeast, and Southwest. These regions/chapters encompassed several states and large geographical areas. The Southwest region/chapter included seven states that included Oklahoma, New Mexico, Arizona, California, Nevada, Colorado, and Utah. In 2008, the Southwest region/chapter initiated steps to form individual chapters due to the difficulty in arranging member activities and serving and the diverse membership. The California Chapter of the Building Commissioning Association was founded in 2010 with California members in the Southwest Chapter of the Building Commissioning Association.

1.8 Locations and Facilities

The mailing addresses of the Chapter President and Treasurer are to be utilized for purposes of correspondence. The Chapter does not have any facilities and does not exist and at physical location. Chapter officers and board members will retain all documents during each term and transfer these documents when leaving office or board position. The Chapter will operate virtually and a website will be maintained to house documents and Chapter records.

Services

2.1 Service Description

1. **Member Meetings:** Regular meetings will be held within the state to offer members and interested parties an opportunity to network, discuss important issues, and informal discussion of best practices.
2. **Training:** Seminars and workshops will be provided for members, interested parties to learn specific commissioning processes, practices, and improve the understanding of commissioning and related issues.
3. **Communications:** In addition to BCA newflash announcements, members will receive periodic announcements related to the commissioning industry in California. Anticipated announcements include, industry related meeting and events, job postings, RFP announcements, governmental regulations, and member announcements.
4. **Lobbying Efforts:** The Chapter leadership will remain abreast of current legislative and governmental initiatives that affect the California commissioning market and inform members of potential consequences. The Chapter may take specific positions on issues that the board of directors and the membership deem necessary.

2.2 Activities and Events:

1. Networking events
2. Regular lunch or dinner meetings
3. Meetings with various organizations (ASHRAE, BOMA, IFMA, AIA)
4. Fundraising events and activities
5. Annual Meeting

2.3 Printed Materials

The management team will obtain BCA brochure and literature to explain the benefits of membership to prospective members.

2.4 Technology

The Chapter Internet website and the social media site will be set up and used to correspond with members in addition to directly communicating through electronic mail (e-mail). Appropriate technology will be employed to store all Chapter documents, data, and information.

Market Analysis

3.1 Market Summary

There are more than 100 businesses in California include commissioning a business competency. A segment of these businesses considers commissioning a primary business activity. Other businesses with core competences in building design, construction, and building maintenance services also offer building commissioning services. Building owners and facility management staffs also conduct building commissioning activities. In addition to these primary providers of commissioning services; government entities, manufacturers, distributors, building code officials, related professional associations and other interested parties in the building commissioning industry.

3.2 Market Segmentation

1. Commissioning providers
2. Architecture & engineering firms
3. Contraction and building maintenance companies
4. Energy efficiency consulting firms
5. Government entries
6. Distributors and manufacturers
7. Other interested parties.

3.3 Market Opportunities

The building commissioning industry continues to grow at a steady rate with more firms entering into the market as the demand for commissioning services increases. Existing building commissioning is being implemented as mandates and incentives for energy efficient and high performance demand increases. With the inclusion of commissioning in building codes and standards, it appears the need for a local industry association is warranted and the membership

will continue to grow. As economic conditions improve the new construction commissioning will provide opportunities due to various sustainability rating systems such as Leadership in Energy and Environmental Design (LEED) where commissioning of building energy systems is required for certification.

3.6 Market Threats

The hectic nature of the lives of current and potential members may limit the growth or decrease membership. Work responsibilities, family, recreation and social activities all require time and commitment that will not avail members and other interested parties to attend and participate in activities and events.

Organizations that provide similar professional development activities and events may distract members, potential members and other interested parties from participating in activities and events or joining the BCA.

Alternative Providers

While there are no direct competitors; however, BCA members may participate in other organizations that are related to commissioning and/or commissioning related services. The organizations include the following:

1. AABC Commissioning Group (ACG) - A non-profit association of certified commissioning authorities, in conjunction with the Associated Air Balance Council (AABC), dedicated to the advancement of professional, independent commissioning services through education, training, and certification of qualified architects and engineers.
2. American Society of Heating Refrigeration and Air Conditioning Engineers (ASHRAE) This organization offers commissioning guidelines, certification, links, research, tools, and recommendations.
3. Association of Energy Engineers (AEE) - AEE is a source for information on energy efficiency, utility deregulation, facility management, plant engineering, and environmental compliance. AEE offers a range of information outreach programs including technical seminars, conferences, books, local chapters, and certification programs.
4. National Environmental Balancing Bureau (NEBB) - NEBB exists to help architects, engineers, building owners, and contractors through training, education and certification. They establish and maintain industry standards, procedures, and specifications for work in its various related disciplines.

Financial Considerations

Financial Goals

Increase our operating capital to meet required operating expenses. Raise our net annual income of currently \$4,000.00 to approximately \$6,000.00 through increasing membership and various fundraising activities.

Financial Plan

- Conduct fundraising activities to increase operating capital by soliciting funds from membership, utilities, corporations, etc.
- Attract new members to the organization by planning regular meetings, training events, and professional development opportunities. As membership increases, the Chapter dues increase generating additional revenue.
- Website advertizing, event drawings, and sponsored events will increase Chapter funds.

Financial Report

See the attached BCA Chapter Financial Report

BCA Chapter Financial Report

Date Filed: 11-11-11

Chapter Name: CALIFORNIA For Period Ending: 11-30-11

Income:

Membership Dues: \$ 75.00

Dinner/Luncheon Ticket Income \$ 0

Other: NAT'L SEED MONEY \$ 1275.00

Other: _____ \$ _____

Total Income \$ 1350.-

Expenses: \$ _____

Meeting Expense \$ 0

Secretary's Expenses \$ 0

Treasurer's Expenses \$ 0

Dinner/Luncheon Expenses \$ 0

Other: IRS Appl. FEE \$ 400.-

Other: CHECK PRINTING FEE \$ 35.61

Total Expenses \$ 435.61

Net Gain (Loss) from Operations: \$ <435.61>

Net Worth at Beginning of Period: \$ 1275.-

Add: Gain from Operations: \$ -

Net Worth at End of Period: \$ 904.39

Cash: \$ 904.39

Savings: \$ -

Other: \$ -

Total Assets \$ 904.39

Liabilities: \$ 0

Accounts Payable: \$ 0

2012 Action Plan

Events & Activities

- The Chapter plans to hold membership-networking events in various California locations each quarter for a total of a minimum of four events. These events will be held at local restaurants with no Chapter expense incurred.
- The Chapter plans to hold two membership meetings, one in southern California and one in northern California. A spring meeting tentatively planned in northern California and a speaker has been identified who will present on data center commissioning. These events will be held at local restaurants with limited Chapter expense incurred.
- The Chapter will hold an annual meeting as required. Location and specific details have not been discussed or arranged.

Financial Impacts

Projected Income	
Current Chapter Assets	\$904.00
Chapter Dues (77 members @ \$50/member)	\$3850.00
Fundraising Activities	\$500.00
Total Project Income	\$5254.00
Projected Expenses	
Wells Fargo Checking Account	\$200.00
Meeting & Events	\$500.00
Website Setup & Hosting	\$450.00
Postage & Printing	\$100.00
Total Project Expenses	\$1250.00
Projected Year End Balance	\$4004.00