

Heating Season HVAC System Operations L/M Meeting Planning Checklist

Work Location: _____ Building: _____

1. What are the maximum and minimum outside air ventilation setting for the heating season, based on outside temperature (the minimum should be 17 CFM of outdoor air per person, or approximately 20% outdoor air)?
 - a. Maximum = _____%, above _____ degrees F
 - b. Minimum = _____%
2. Has HVAC filtration been increased to the highest level possible based on the capability of the system preferably to MERV-13 as defined in ASHRAE 2017b? Yes No
 - a. If no, ask the rating of filters used and what is the highest rating the system can handle.
3. Were the filters changed as part of the conversion from the cooling season to the heating season? Yes No
4. Will the HVAC systems be kept running longer hours or at a higher flow rate, up to 24/7 if possible, and at least 2 hours before occupants arrive and the last person leaves the building? Yes No
 - a. Ask for the HVAC systems operating schedule(s).
 - b. If no, ask why not?
5. Will portable room air cleaners with HEPA or high-MERV filters provided to supplement the reduction in outside air supply during the heating season? Yes No
 - a. Obtain a list of areas where portable air cleaners are being used and their capacity.
 - b. If no, ask why not?
6. Will upper room, and/or portable, UVGI devices be provided to supplement the reduction in outside air flow during the heating season? Yes No
 - a. Obtain a list of areas where UVGI devices are being used and their capacity.
 - b. If no, ask why not?
7. Will temperature and humidity levels be maintained within the established ASHRAE seasonal guidelines with temperatures between 68 F to 74 F and humidity between 40% and 60%. Yes No
 - a. If yes, obtain information on how the indoor air conditions will be monitored to assure they remain within the desired ranges for relative humidity and temperature.
 - b. If no, ask why not?
8. When will the conversion between heating and cooling season occur next year?
 - a. Approximate Date: _____/_____/_____
 - b. Conditions to trigger the conversion: _____

Ventilation Labor Management Meeting Planning and Follow-up

L/M Meeting Preparation:

Clearly communicate to management the type of questions you plan on asking so they can be prepared for the meeting and ensure the right individuals are present or the information they provide is obtained in advance of the meeting.

If there are concerns about the operation of the buildings ventilation systems during the COVID-19 emergency, request the School Reopening Plan required by the NYSED or the employer's pandemic Continuation of Operations Plan (COOP).

If information about the details of the buildings ventilation systems and how they are maintained is needed request a copy of the last two Building Condition Surveys required by the NYSED that must be done by a licensed engineer or architect every five years and are available to the public, or the service records for the HVAC system.

Document the answers from the meeting and afterwards enter them on this fillable form. Keep your original meeting notes and the completed form for your records. If assistance is needed send a copy of the completed fillable form to your Labor Relations Specialist (LRS) and/or Occupational Safety and Health (OSH) specialist.

Information from the ventilation system review (from page 1):

1. Review how the outside air ventilation rate is being established to prevent system damage from freezing and to maintain the temperature and relative humidity conditions in the building within the temperature and relative humidity parameters for the heating season as given in question 7, which are from ASHRAE55-2017.
2. Request documentation from the ventilation system equipment manufacturer, which will state the highest level of filtration on the Minimum Efficiency Reporting Value (MERV) scale, which are defined in the ASHRAE 2017b standard. A MERV rating of 13 or higher is recommended to reduce airborne infection potential.
3. Determine if the filters were changed as part of the recent system conversion from cooling to heating. If they were not, determine why (they may have been recently changed due to a recent filter efficiency upgrade)?
4. Review the HVAC systems operating schedules, which should be as long as possible, without having a negative impact on wear to the mechanical system, and at a minimum at least 2 hours before occupants arrive and the last person leaves the building (ASHRAE Position Document on Infectious Aerosols - https://www.ashrae.org/file%20library/about/position%20documents/pd_infectiousaerosols_2020.pdf).
5. Review the manufacturers documentation for any HEPA or high-MERV filtration units in use to be sure they are adequately sized for the square footage of floor space(s) where they are provided.
6. Review the manufacturers documentation for any UVGI upper room or portable units in use to be sure they are adequately sized for the square footage of floor space(s) where they are provided.
7. Review the temperature and humidity parameters, which should be between 40% and 60% for relative humidity and temperatures within the established ASHRAE seasonal guidelines, of 68 F to 74 F in the heating season. Determine how they are monitored on a real-time basis to assure they are maintained within building, and actions to be taken, like supplemental humidification, if they cannot be maintained in accordance with ASHRAE 55-2017.
8. Establish either the approximate date(s) or the weather conditions under which the system is converted back to cooling (spring/summer).