

HOW TO FORM AN ENERGY CODES COLLABORATIVE

Step 1: Assemble a Collaborative “Forming Group”

- 1. Bring together a small like-minded group that has a known interest in compliance.
- 2. This initial FORMING GROUP takes on the responsibility to initiate a collaborative but this is NOT the collaborative.
- 3. Initial groups role is to:
 - Brainstorm potential stakeholders that need to be involved.
 - Organize a first collaborative meeting – set time, date, location and build a meeting agenda.

Step 2: Prepare for the Meeting

- 1. Develop a meeting agenda with a clear purpose and clear outcome.
- 2. Enlist the aid of a professional and experienced facilitator to help you put together the agenda.
 - The facilitator will facilitate the meeting.
- 3. Try to set a time date and location that you know will work for interested parties to attend.
- 4. Consider a neutral location for the meeting such as a city or county meeting room – or possibly the home builder association meeting space.

INSIGHTS

- ✓ *The **meeting purpose** explains why you are meeting*
- ✓ *The **meeting outcome** explains what you hope to achieve*

Step 3: Invite Interested and Crucial Representatives

- 1. Though you don’t want to exclude, you may want to limit the number of representatives from each group.
 - Whomever wants or need to have a voice in energy code compliance.
 - Look for those groups or individuals that have a position on energy codes.
 - Or a group that has expressed an interest in energy codes, for example, two representatives from:
 - State agencies responsible for code implementation
 - Builder groups
 - Architect and engineer associations
 - Consumer protection groups
 - Building official associations
 - City and county associations

INSIGHTS

- ✓ *If you think there is a group or individual representing a group of interests that would derail the collaborative – **MAKE SURE TO INCLUDE THEM.** Consider hosting the meeting at their facility, and ask them to invite their member representatives.*

INSIGHTS

- ✓ *Be fair, be clear. If you plan to have two representatives per organization from your FORMING GROUP, allow other groups to send two representatives*

- 2. To help bring in attendance you may want to ask a neutral but known party to extend the meeting invite

Step 4: Prepare for the Meeting

A. Understand Key Issues

- Identify the KEY ISSUES on the agenda. You should know what the FORMING GROUP Key Issues are previous to going into the meeting.

- A Key Issue may be something like: *“Knowing that code compliance is a key issue to the Department of Energy, and that our Governor has agreed to achieving 90% compliance to the 2009 IECC, what can we do as a group to assure good compliance? In what time period? And, how will we know when we get there?”*

INSIGHTS

- ✓ This may be the one and only key issue for your first meeting. Discussion on this could be your entire first agenda.

Step 5: Initiate the Meeting

- Initiate the meeting.

- Use a professional facilitator if possible
- This meeting is all about FORMING a collaborative
- Your meeting process needs to be followed
- Remember to be clear about purpose and outcome, e.g.: *“PURPOSE: We are here to discuss key issues to energy code compliance”; “OUTCOME: We would like to establish an on-going collaborative to discuss compliance issues”.*
- Seek separation of POSITIONS from INTERESTS

INSIGHTS

- ✓ Keep the first meeting short.
- ✓ You may not be a working TEAM yet but seek some level of agreement to continue working together.
- ✓ You do not need to call yourself a collaborative
- ✓ You do need to keep the first meeting positive and outcome oriented
- ✓ Set rules:(e.g., Listen to everyone and speak only when it's your turn)
- ✓ Holding the meeting over a sponsored breakfast or lunch works well
- ✓ You will still experience some STORMING

INSIGHTS

- ✓ A “POSITION” is *“the energy code is out-pricing buyers from the market”*
- ✓ AN “INTEREST” is *“we want to make sure that the energy code doesn't make homes so expensive that people can't afford to buy new homes.”*

Step 6: Formalize the Collaborative

- Following the first Collaborative meeting, confirm the establishment of the Collaborative; thank members for their contribution to the state.
- Identify who will lead the Collaborative going forward, or at least set upcoming meeting dates.

Step 7: Set up a Second Meeting

- How much time after the first one? How regular should the meetings be in the first year? After that is it on an “as-needed” basis (once “performing” is achieved?)

INSIGHTS

- ✓ *You will not move forward until you find common interest, goals and objectives, and then begin to move toward objective achievement.*

Step 8: Set Performance Objectives

- Determine your compliance goals (percentage of compliance desired, quality of workmanship desired, etc.)
- Determine the key players in achieving code compliance: (code jurisdictions, designers, builders, sub-contractors, etc.)
 - Where does ultimate responsibility or authority lie?
 - How will you measure compliance? (PNNL protocol? Other?)
 - What is the cost? And who pays?

INSIGHTS

- ✓ *Performance objectives should clearly indicate who will do what by when, what will it cost, and how it will be measured.*
- ✓ *You will not move forward until you find common interest, goals and objectives, and then begin to move toward objective achievement.*

Step 9: Normalize and Seek to Perform

- Set regular meeting dates (monthly or quarterly?). Once the group is established, the meeting regularity can change based on needs.
- When one individual from an organization drops out, another from that organization can be identified.
 - If the organization chooses to stop participating, another organization from that sector (code official, builder, etc.) should be identified by the group.