

## **CABA's White Paper Terms of Reference (Revised April 7, 2017)**

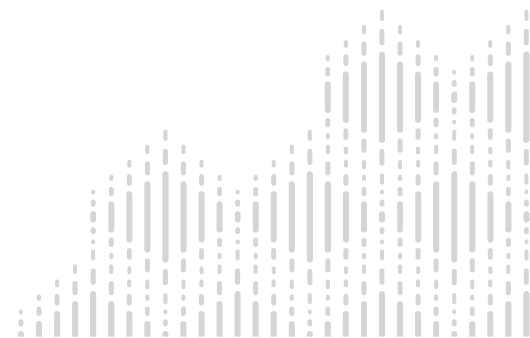
### **Objectives:**

1. Educate the CABA membership and industry at large on emerging research, information, and challenges in the intelligent buildings and/or connected home sectors.
2. Improve the quality and credibility of white paper research via a peer-review process.
3. Foster idea sharing in accordance with anti-trust laws, which could lead to new CABA research and collaborations.
4. Assist companies and individuals to promote their white papers to the industry.
5. Support companies and individuals in the production of white papers through:
  - a) The formation of volunteer Working Groups made up of subject matter experts.
  - b) A formal review process that provides direction, insight, feedback, and credibility.
  - c) The identification of a suitable author(s) if required.

### **Process:**

- 1. Proposal:** A one (1) paragraph white paper proposal should be submitted to the CABA Research Director. Only CABA members can submit a proposal. This proposal is a general outline of the paper and will be shared with prospective Working Group volunteers.
- 2. Proposal Approval:** The proposal will be shared with either the Connected Home Council (CHC) or Intelligent Buildings Council (IBC) White Paper Sub-Committee (WPSC) for review and approval. The IBC and CHC each provide direction to the WPSC that report to them.

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**3. Formation of Working Group (Optional):** Once the proposal is approved a request for Working Group volunteers is made to either the CHC or IBC. A two (2) week timeframe is given for CHC and IBC members to volunteer. The CABA Research Director will send a reminder after one week. In the rare case where the author(s) does not want a Working Group, this step is skipped.

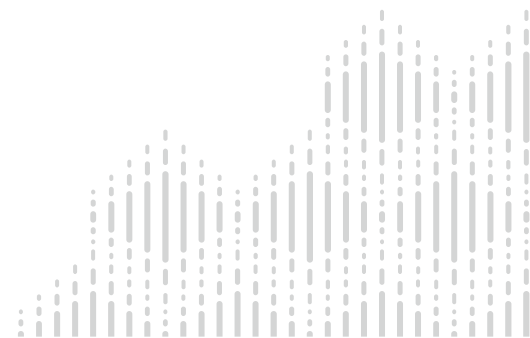
**4. Request for Authors (Optional):** If no author is identified from the Working Group for the proposal, the CABA Research Director will send an email to all CABA member research firms requesting volunteer authors. If an author can not be found, the proposal can not proceed.

**5. Final Draft Date and Working Group Call:** Once the Working Group is formed, it is the responsibility of the author(s) to notify the Working Group and the CABA Research Director of the expected completion date for the final draft paper. It is also the responsibility of the author(s) to schedule a one (1) hour conference call with the Working Group or to exchange emails. The goal of this conference call or email exchange is to develop an outline for the paper.

**6. Write Paper:** Once the outline is developed, the Author(s) can start writing the paper. Papers are approximately 10-20 pages of secondary research (literature review from existing sources). This paper must not be marketing material or promote a business or technology agenda. The paper must be new and not an already existing paper re-branded. Papers should be composed using the CABA template provided. The CABA Director can assist with using the template. Papers normally take two (2) months to write but the authors will have a maximum of four (4) months to develop the paper (from the date the Working Group is formed), subject to negotiations with the CABA Research Director.

**7. Final Draft Approval:** The CABA Research Director will send the final draft of the paper to either the CHC or IBC WPSC for review and approval. A conference call will be made with the WPSC and the main author(s) to discuss the paper and answer any questions.

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**8. Promotion:** Once completed the paper is approved, the white paper will be distributed to the CABA membership, added to the CABA Members Research Library (<http://www.caba.org/Member-Research-Library>), CABA Public Research Library (<http://www.caba.org/Research-Library>), promoted at the CABA Intelligent Buildings & Digital Home Forum and other industry events.

**Other:**

1. The CHC and IBC, as directed by the CABA Board of Directors, will oversee and provide direction to their prospective WPSCs.
2. A Chair of the white paper will be named and they will be responsible for the completion of the white paper.
3. The objective of CABA is to produce a minimum of four (4) white papers per calendar year.
4. The WPSC is made up of either CHC or IBC member volunteers, led by a WPSC Chair. Volunteers come from a broad range of backgrounds and intelligent building or connected home expertise is required. There is no limit to the number of WPSC members.
5. Author(s) and Working Group members will be appropriately cited and have unrestricted use of the white paper for promotional purposes.
6. Both CABA members and non-members can volunteer to author a paper or be part of a Working Group.
7. There is no additional fee to be involved in the CABA White Paper Program and no financial compensation will be provided to the authors or Working Group volunteers.

**Past CABA White Papers:** [www.caba.org/white-papers](http://www.caba.org/white-papers)

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