

## **CABA's White Paper Terms of Reference (Revised Aug 28, 2020)**

### **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.

### **Timelines:**

- 1. Proposal Approval:** Proposals will be approved within two (2) weeks after they have been received by the CABA Research Director.
- 2. Finding Author(s) (if required):** If an author(s) is required they will be found within two (2) weeks of the proposal being approved. If an author can not be found, the proposal can not proceed.
- 3. Formation of a working group (if required):** If a working group if required it will be formed within two (2) weeks of the proposal approval and the finding of an author(s).
- 4. Start of White Paper:** The paper must be started with the first working group meeting within three (3) weeks of the formation of the working group.
- 5. Completion of Final Draft:** After the paper is started a final draft must be submitted within two (2) months.

## **Process:**

- 1. Proposal:** Complete the one page CABA White Paper Proposal Form ([www.caba.org/whitepapers](http://www.caba.org/whitepapers)) and email it 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. The individual(s) who bring forward a proposal will agree to be the Chair of the working group. The role of the Chair is to make sure the paper is completed on time and to organize and lead all working group meetings. Normally there are between one and three working group meetings, each one hour in length).
- 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.
- 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 working group will be formed within two (2) weeks. Working group members do not need to be CABA members. Working group members are not required to author the paper but provide subject matter expertise or other assistance to the creation of the final draft paper. In the rare case where the author(s) does not want a Working Group, this step is skipped.
- 4. Request for Authors (Optional):** If a CABA Member brings forward a proposal but is not able to author, the paper, the Member will send CABA \$500 USD. CABA will try to find an author from one of our CABA Member research firms. The \$500 will be given to the author(s) as an honorarium for their work in writing the paper. If an author cannot be found, the \$500 will be returned to the Member.
- 5. Final Draft Date and Working Group Call:** Once the Working Group is formed, it is the responsibility of the white paper Chair 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 white paper Chair 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. Normally there are between one (1) and three (3) working group calls that are one (1) hour each.
- 6. Write Paper:** Once the outline is developed by the working group, 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. The final draft of the paper must be completed within two (2) months after the first working group meeting.

**7. Final Draft Approval:** The CABA Research Director will send the final draft of the paper to either the CHC or IBC WPSC (or both) for review and approval.

**8. Promotion:** All white papers are complimentary to anyone in the industry. 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 various industry events.

### **Role of White Paper Sub-Committees:**

1. The White Paper Sub-Committees (WPSCs) are made up of volunteers led by a WPSC Chair. WPSC member volunteers are not required to be CABA members. 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.
2. All White Paper Sub-Committee (WPSC) members are required to review all white paper proposals and white paper final drafts. WPSC members who are not actively participating will be removed from the sub-committee.

### **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 responsible for the completion of the white paper in a timely manner.
3. The objective of CABA is to produce a minimum of four (4) white papers per calendar year.
4. Author(s) and working group members will be appropriately cited and have unrestricted use of the white paper for promotional purposes.
5. Both CABA members and non-members can volunteer to author a paper or be part of a working group.



6. CABA receives no financial compensation for the development of white papers.
7. The White Paper Proposal Template Form and completed papers can be found at [www.caba.org/whitepapers](http://www.caba.org/whitepapers).