



# **The Code Innovations Database: Strategic Work Plan**

## **Phase IV: Regional Expansion 2016-2018**

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**For the Code Innovations Partnership:**



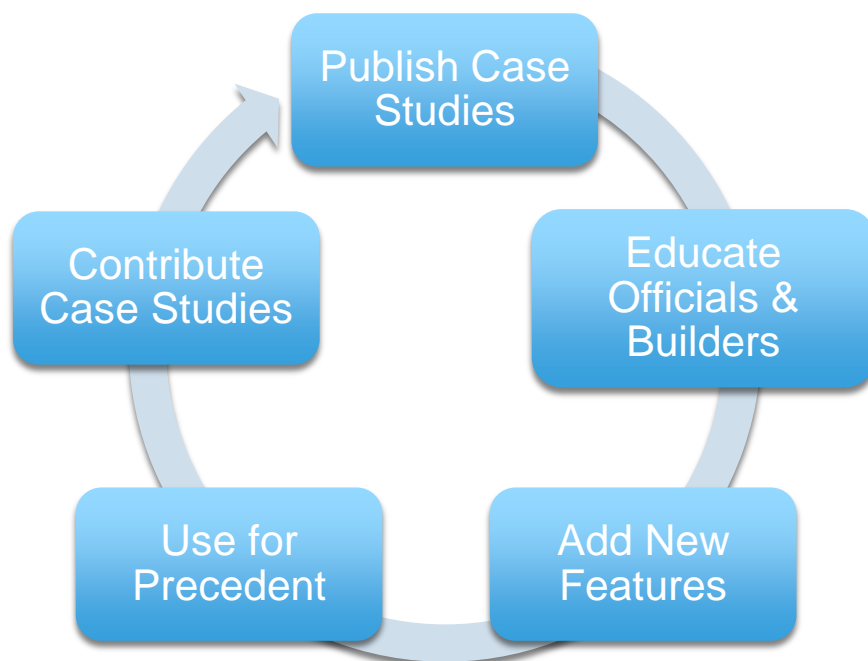
## Phase IV Strategic Work Plan: Regional Expansion 2016-2018

The Northwest EcoBuilding Guild (NWEBG) led the initial development of the Code Innovations Database (CIDB), an online resource to document and share information about successfully permitted, high-performance green building innovations. We are proud to have established the infrastructure and proven the concept for the database, and so that we can now undertake a regional expansion to make the CIDB the go-to resource for how to permit cutting-edge design and construction projects. This three-year strategic work plan presents the scenario for expansion throughout the Cascadia bioregion for which we are seeking support.

**Vision:** **Make it Easier to Build Green**  
**CIDB Strategy:** **Get actionable information into the hands of every Code Official, and on display in most Permit Centers across the Pacific Northwest.**  
**Outcome:** **Accelerate adoption of innovations and green building codes**

CIDB is the only vehicle of its kind designed to allow code officials to cite technical precedent for approving innovations. As the market moves to innovative prescriptive- and performance-based codes this database is one of the necessary tools to get *more green projects designed, permitted and built.*

To make it easier to build green NWEBG is seeking key regional partners to support the CIDB expansion over the next three years. The key elements of the CIDB program are to greatly expand the case study content available in the database, using a proven outreach and research development method; and to educate code officials about the CIDB and how to use it to approve non-prescriptive innovations. Behind the scenes, we will continue to iteratively develop and add database features to expand its reach, bring on new partners to deliver CIDB content to their audiences, and create a virtuous cycle of database use and contribution to new case studies.



The key operational elements for NWEBG to deliver a compelling CIDB program are to expand capacity and ensure robust oversight including executive management from NWEBG's board and paid staff members for implementation. To that end we propose to:

- Hire an experienced program manager to oversee all aspects of the CIDB program
- Partner with sister organizations to develop content and advocate with jurisdictions
- Contract with research supervisors to oversee and provide quality assurance / quality control intern and volunteer case study development from Vancouver BC to Ashland, OR.
- Expand administrative support for the project as needed

To deliver this expansion in 2016-2018, the NWEBG needs \$250,000 / year for the next 3 years. Knowing that budgets are tight with non-profits and funders alike, we may find it challenging to raise the full \$250,000 proposed budget this first year. In that case, we have developed three scenarios to reflect a high, low and minimum level of funding for the program, to account for a possible scaled-back reality we may find ourselves in come June 2016. The scenarios are hypothetical. To increase flexibility of the Board and Funders, the budget is presented per deliverable.

1. \$250,000: The high budget includes all the elements described below being delivered within 12 months
2. \$140,000: The low budget reflects 44% less income and a scaled-back scenario for the project
3. \$60,000: The minimum budget is the amount of firm committed and contracted funds we need to move forward

We are currently pursuing opportunities to secure the minimum budget needed to move forward from several sources of grants and contracts. These include:

- The Northwest Energy Efficiency Alliance
- The International Code Council
- The Bullitt Foundation
- The Russell Family Foundation
- The Alfred P. Sloan Foundation
- Washington Womens' Fund
- Portland Metro jurisdictions
- Regional Code Collaborative (Puget Sound)
- International Living Future Institute
- New Buildings Institute
- Members, Allies and Supporters
- Washington Assoc. of Building Officials

If we can secure commitments for the minimum budget by Q4 2015, we may commence work early while continuing to raise the remaining budget. If we only succeed in securing the "low" budget by Q2 2016, we will curtail overall deliverables by 35-50% (e.g. publish 25 case studies instead of 40), and cut element 4 "Develop CIDB Curriculum and Deliver."

We may also be able to secure some of the needed resources through in-kind commitments of partners' resources, professional services and materials, such as:

- Legal Services (copyright and trademark)
- Staff training and tech support for Salesforce, SEO, and SAAS Web Development
- Marketing and outreach expenses (tradeshows, advertising, how-to videos)
- CEU Accreditation

## 1. Enhance Database Content

<b>Goal</b>	CIDB is comprehensive platform for high performance / green building code innovations in Cascadia bioregion
<b>Metric</b>	Expand database to 300+ case studies by Dec. 2018

A key element for work in 2016 is to greatly expand the case study content available in the database to increase its value and relevance to code officials and builders. We have established researchers with capacity to be deployed. We will curate all existing content and more than double that content in 2016.

### 1.1 – 1.2 Increase Number of Case Studies

- **Add 30 more Code Innovations case studies** by January 2017
- **Add 10 Innovative Green Codes / Compliancy Initiatives case studies** by January 2017

*See Appendix B Prospective Research List raw material for 2016 Research Plan in development, more than 60 possible studies identified*

**1.3 Curate existing Case Studies and other content** – review all existing case studies and other content; update with new resources as applicable by September 2016.

## 2. Develop and Add more features

<b>Goal</b>	Build additional features identified by users for delivery via Software as a Service (SAAS) model.
<b>Metric</b>	Complete User survey & focus group, report and recommend by March 2015 Add 2 New Content Types: Innovative Codes; and Compliancy Initiatives

Long-term revenue sustainability will come from the CIDB's ability to roll out features requested by users in a SAAS delivery model.

### 2.1 Add Features – Work with Users to identify prioritized list of features for implementation

**2.1.a New Case Study Types – a) Innovative Green Codes and b) Code Compliancy Initiatives**, will be case studies that document successful and emerging codes, standards and compliancy initiatives for high performance green building codes

**2.1.b Develop SAAS Business model based on user survey:** Conduct UX design survey and focus group(s) of current/potential users to determine priority features, willingness to pay.

**2.2 Build New Features via SAAS Model:** In 2016-17 make UX design improvements and implement SAAS business model for self-sustaining revenue.

While this work plan element is just 10% of the 2016 budget, we expect it to be 30-50% in 2017. It is intentionally small for 2016 because after introducing two new features in Q1 2016, we'll focus the rest of the year on user assessment, planning and funding future enhancements.

**2.3 Develop consultancy business model to assist project developers and jurisdictions identify and navigate effective compliance pathways, partnering with Guild member businesses**

## 3. Engage code officials and builders

<b>Goal</b>	Get code innovations information into the hands of every code official in the Pacific Northwest through partnerships
<b>Metrics</b>	Expand the reach of the program 500% or more through multiple marketing avenues and outreach impressions in 2016 10 Jurisdictions invested in the Code Innovations Partnership

The Phase III market survey and marketing plan will be updated, validated and implemented through 7 strategies to leverage partnerships and volunteer energy through multiple media:

**3.1 Displays in Permit Centers** to market the Database and give jurisdictions a valuable educational tool to meet their sustainability goals. Several countertop displays now deployed will be maintained (Thurston County, Cities of Olympia, Tumwater, Lacey, Issaquah, Redmond, and Edmonds, Port Townsend), and 20 more will be placed. Place 2 prototype multimedia educational kiosks in permit centers to demonstrate green building innovations, including Database + Technical Flash Cards.

**3.2 YouTube Optimization** produce a series of instructional “how to” videos for people wanting to use and contribute to the database. Publish and optimize video content on the Guild’s YouTube channel.

**3.3 Search Engine Optimization** implement SEO strategies to ensure #1 ranking in key search engines. Increase search engine hits by X and organic referrals by Y.

**3.4 E-Communications** Expand current list of 1000 Code officials and 1000 Innovators by 5x. Use targeted outreach and mailing list analytics increase open rate and clicks by Y. Send quarterly updates to code officials and partners to highlight new content and features so that CIDB communications are seen as highly relevant in order to 1) encourage inclusion in jurisdictions’ 2016-17 budget; 2) word-of-mouth promotion; and 3) and use of the database.

**3.5 Tradeshows and Events.** Table/sponsor 4, and give presentations at 4 conference-tradeshows...

**3.6 Earned media.** Gain earned media exposure, i.e. print and online articles, radio interviews, etc. and in time, sell syndicated content to online publications such as...

**3.7 Advertising and Promotion.** Purchase strategic advertisements in trade journals and web publications such as Conduit, EcoBuildingPulse.com (AIA),

**4. Develop a Training Curriculum and Deliver**

<b>Goals</b>	Develop, adapt, and deliver a Code Innovations training curriculum through educational partnerships
<b>Metrics</b>	First 3 Modules completed, delivered to code officials, builders and emerging professionals beginning September 2016

Based on the Phase III Powerpoint workshop given 20+times 2012-14, we will develop a new training curriculum for continuing education for code officials, builders and green professionals; leverage partnerships to deliver content to multiple audiences

**4.1 Develop a Code Innovations Training Curriculum.** 20-hour curriculum consisting of six 2-4 hour training modules, including classroom, field work and site-based demonstrations:

- A. Code Innovations: Alternative Materials and Methods - non-prescriptive compliance cases, model programs and trends, aligned with ICC Evaluation Services
- B. Evolving High-Performance Energy and Green Building Codes - trends, factors and innovations driving advanced building codes
- C. Code Innovations Database – working with local jurisdictions’ permit centers and builders on research and education/outreach to “make it easier to build green.”
- D. Innovative Code Compliancy Initiatives - best practices and leading examples of multi-jurisdictional and public-private partnerships advancing green codes and innovation
- E. Incentives available for high-performance & sustainable innovations in design and construction
- F. ½ - day Field Visit & Practicum on Code Innovations

**4.2 Adapt and Deliver** the first 3 curriculum modules beginning in September 2016

**4.2.a Interdisciplinary Workshops and/or a V2A Symposium**

- 4.2.b CEU training partnerships with AIA, MBAs, WABO, Real Estate
- 4.2.c Academic Program Partnership if capacity and resources allow
- 4.3 Online courses and training webinars to expand impact of curriculum (2017 or 18)

**Element 5: Advocacy and Opinion**

<b>Goal</b>	TBD
<b>Metric</b>	TBD

The Code Innovations Database is primarily an educational resource that advances the Guild’s Mission to transform the built environment for long-term sustainability through education. However, the Database and our other signature programs position the organization to exert leadership influence within the industry (promoting innovation and sustainability best practices) and in the realm of public policy (promoting advances in high-performance green building codes).

In the process of planning for Phase IV, we identified several distinct opportunities to demonstrate such leadership by partnering with other organizations involved in code innovations:

- 5.1 Partner with International Code Council, Western Regional Office & ICC Evaluation Services to align program and advocate state support for alternative means and methods
- 5.2 Partner w/WSU & NEEA to document and advocate adoption of EU CEN standard as equivalent to UL
- 5.3 Partner with ILFI, Bullitt & Recode to document and advocate new compliance pathways for Living Buildings, Net-Zero energy, Net-Zero water projects
- 5.4 Partner with 2030 Inc, PGL, NBI to document and advocate outcome-based energy codes
- 5.5 Publish editorials on Code Innovations Blog and other publications

Advocacy and opinion is unsupported by our current staff and financial capacity. As it grows, it will be up to the Guild Board of Directors to discuss and decide on goals and objectives in this regard, if any. Prospective funders may also be interested to see this part of our plan more fully developed.

**6. Program Management, Oversight and Development**

<b>Goals</b>	Secure grants and contracts to fulfill budget Build capacity, i.e. hire, train and supervise staff to implement the workplan Review and update operations plan and methodology Evaluate and report on the workplan
<b>Metric</b>	60% of Year 1 budget secured by April 2016, 100% by June 2016

An initial emphasis on securing grants to support regional expansion, while establishing business relationships (contracts) and a business model to generate operating revenue from partnerships, trainings, events, and/or e-commerce to support both the Database and the Guild overall.

- 6.1 “CIDB Champions” and Crowdfunding with Members, Allies and Supporters. June 2015 – December 2015. Raise \$50,000 from major donors and crowdfunding to help meet minimum budget
- 6.2 Secure Grants and Contracts to Fulfill budget. June 2015 – June 2016, fundraising to fulfill Year 1 budget of \$250,000. Budget and Plan may be scaled back to reflect reality.

- 6.3 Business Plan for Self-Sustaining Revenue** from potential lines of business:
- A) Contracts and Annual Fees from Member Jurisdictions
  - B) Online “subscription” fees on premium content currently accessible at no cost.
  - C) Syndicated content sold to related online publishers
  - D) Registration income from Code Innovations classes and workshops
- 6.4 Standard Operating Procedures Manual** to document procedures for business operations, administration and oversight; establish metrics and methods for directing and evaluating staff.
- 6.5 Copyright and Trademark.** Secure ownership rights from Thurston County, copyright and trademark the Database, all its content and proprietary infrastructure for the NWEBG
- 6.6 Hire Principal Investigator and Research Supervisors** to execute this plan
- 6.7 Board oversight and evaluation of staff**
- 6.8 Day-to-day administration, including increase scope of OrgSupport Contract** to include increased activities, fundraising support, SAAS Web development
- 6.9 Research Methodology Review and Update.** Perform gap analysis, create technology plan, make necessary infrastructure and content changes, and publish a Comprehensive Methodology Guide with 3 versions for Volunteer Researchers, Innovators and Code Officials
- 6.10 Review and Update Users Guide** in light of UX design survey and focus group(s).
- 6.11 Mentor and Supervise Subcontractors and Volunteers.** Principal Investigator will provide leadership and supervision of the team including Research Supervisors, volunteers and interns. Research Supervisors will give direction and assist volunteers and interns in contributing work.
- 6.12 Program Evaluation and Reporting** – Formative Evaluation in May 2016, include in Q2 report to Board and Funders. Next Cycle April – May 2017, reporting on the first year deliverables and metrics established herein.

**Appendix A: Strategic Workplan and Budget**

[See attached Excel spreadsheet CIDB Phase IV Strategic Workplan.V2.0]

**Appendix B: 2016 Prospective Research List**

[See attached Excel Spreadsheet]

**Appendix C: Powerpoint Slides of this Proposal**

[See attached Powerpoint Presentation]

## CIDB 2016 - Overview Budget

Enhance Database Content	\$ 100,000.00
Add Features	\$ 25,000.00
Engage Code Officials & Builders	\$ 45,000.00
Develop Training Curriculum & Deliver	\$ 20,000.00
Other/Hard Costs	\$ 15,000.00
Program Development & Management	\$ 20,000.00
NWEBG Overhead (10%)	\$ 25,000.00
<b>Total:</b>	<b>\$ 250,000.00</b>

