



## **CIBSE ASHRAE Strategic Partnership Agreement**

### **Signed 4th December 2020**

#### **ASHRAE and CIBSE**

Founded in 1894, ASHRAE, Atlanta, Georgia advances the arts and sciences of heating ventilating, air-conditioning and refrigeration to serve humanity and promote a sustainable world.

Founded in 1897, CIBSE is the professional body that supports the Science, Art and Practice of building services engineering, for the public benefit, by providing members and the public with first class information and education services and promoting the spirit of fellowship which guides our work.

Being the only two organizations in our field that have global reach, there is significant potential benefit from working together. In our home markets ASHRAE and CIBSE can improve the quality of our services and output while reducing costs and overlap. In other countries the organizations can improve programs for indigenous markets by providing coordinated offerings. Joint initiatives will improve our preparation for, and the implementation of, activities to lead the progression to digital technologies, full digital publishing, and virtual design and construction.

This Strategic Partnership Agreement provides a framework for those benefits to be realized: it creates a roadmap to advance and promote the mutual interests of ASHRAE and CIBSE, with a practical commitment to working together on the following activities and goals that serve our membership and the public and to promote a more sustainable world.

#### **CONSISTENT LEADERSHIP COMMUNICATION**

Recognizing the importance of communication in organizational collaboration, both organizations commit to hold an ASHRAE/CIBSE liaison meeting at least annually (preferably in person, or via electronic meetings) of designated ASHRAE/CIBSE senior representatives to:

- Ensure ongoing advancement of collaborative projects.
- Discuss new opportunities for collaboration.
- Monitor progress on collaborative projects underway
- Keep each respective organization informed of major initiatives.
- Develop strategies for positioning both organizations as leaders in addressing buildings industry challenges.

Action items with assigned responsibilities shall be recorded at each meeting.

ASHRAE/CIBSE shall consider annually holding a staff exchange, where one or more paid staff members from one organization will spend a minimum of one week up to several weeks working at the other organization's headquarters or other key location. The purpose of this exchange is to increase communication between the two organizations, share best practices, and identify possible areas of collaboration in order to develop a strategic vision of how the two organizations can work more closely together. ASHRAE/CIBSE shall also explore the opportunity of a long-term staff exchange involving the exchange of a staff member for a period of 3 to 6 months.

The ASHRAE/CIBSE senior officers will determine by mid-January each year whether or not to hold a staff exchange during the new fiscal year. If an exchange is to occur, then the chief staff member and senior officers of each respective organization will identify the staff members assigned to participate in these exchanges.

The two organizations will endeavor to assign one staff member from each organization a set apportionment to the other organization such that a percentage of his/her time (e.g., 10%) is assigned to liaising and participating in activities of the other organization

ASHRAE/CIBSE shall also hold an annual meeting to discuss strategic issues to ensure both organizations are working towards a strategic alignment to benefit both organizations. This meeting may be held in person or virtually (in-person meetings are preferred) and the typical duration of the meeting (or combined meetings) will be 8 – 12 hours. ASHRAE and CIBSE will alternate hosting in-person meetings.

To ensure identified opportunities and collaborative projects are efficiently pursued in each organization, a workgroup will be formed. The workgroup will meet on a quarterly basis and comprise of two ASHRAE members and two CIBSE members, who normally should be past, or present, board level members with international experience. Additionally, a staff member from one of the organizations will be assigned to the workgroup to facilitate the work of the workgroup.

The objectives of the workgroup are to provide active points of contact between ASHRAE and CIBSE, to enhance collaboration and to ensure that collaboration is ‘front of mind’ for both ASHRAE and CIBSE. The workgroup will achieve this through activities that are likely to include:

- Acting as catalyst in the implementation of specific joint activities including those identified by ASHRAE/CIBSE leadership
- Identifying gaps in activity where joint endeavors would provide benefit
- Specifically identifying “fast track” issues/opportunities
- Uncovering potential obstacles in communicating and sharing knowledge between the organizations
- Highlighting commonalities and overlaps in the themes of incoming presidents
- Providing timely guidance to ASHRAE/CIBSE leadership on relevant issues
- Recording and monitoring proposed joint activities
- Guiding agenda items for the CIBSE-ASHRAE liaison meeting

The workgroup will produce a biannual summary of workgroup activity for the CIBSE-ASHRAE liaison committee.

The workgroup will be dissolved after two years if a reasonable set of outcomes from the workgroup cannot be identified

In order to facilitate better communication, generate better familiarity and inspire a search for mutual opportunities, both CIBSE and ASHRAE will extend complimentary membership in their organization to the Executive Board of the other organization.

### **CONFERENCES AND MEETINGS**

Each organization agrees to provide the other with an invitation and two complimentary VIP registrations to the organization’s primary annual meeting. Further, ASHRAE and CIBSE agree to explore opportunities to provide speakers at the other organization’s meetings to help provide updates and perspectives on technologies and trends of mutual interest. The purpose in attending and speaking at each other’s conferences is to increase communication between the two organizations, create an environment of cross-pollination and provide an avenue to identify future

collaboration opportunities. Of particular interest are collaboration opportunities in emerging topics such as digital technologies, resiliency, and environmentally transmitted pathogens.

Recognizing that specialty conferences are an excellent method of serving members in specific geographic areas, industry sectors or climate zones each organization will alert the other organization of specialty conferences under consideration or development. Where mutually beneficial, each organization shall help publicize the other organization's meetings and promote attendance, focusing on targeted audiences with potential interest in the particular conferences.

Both organizations will jointly explore the development of an annual meeting outside of the US and UK, potentially online, that may include an educational focus and an organization focus.

### **GRASSROOTS COLLABORATION**

ASHRAE and CIBSE agree to coordinate promotion of joint grassroots meetings of respective members. It is the intent of this agreement to produce a long-term relationship that is mutually beneficial to the membership. In order to achieve this intent, the following activities are to be explored:

- Exchange of leader contact information to ensure that the Women in ASHRAE (WIA) and Women in Building Service Engineering (WIBSE) groups work together to produce cross-pollinate ideas and identify opportunities to work collaboratively.
- Exchange of leader contact information to ensure that the Young Engineers in ASHRAE (YEA) and the Young Engineers Network (YEN) of CIBSE work together to cross pollinate ideas and identify opportunities to work collaboratively.
- CIBSE and ASHRAE will explore ways in which ASHRAE can support the CIBSE/ASHRAE group in the future, including administrative and technical support, as well volunteer support.
- Other activities identified during the previously described leadership meetings and staff exchanges.

### **ADVOCACY**

Where mutually beneficial and to the extent allowed by laws and corporate policies, ASHRAE and CIBSE agree to work together on common public affairs goals and ideologies. During annual liaison meetings, public affairs strategies will be discussed, and common goals identified. Collaborative opportunities to be considered include:

- Joint promotion of codes and standards
- Promoting mutually beneficial positions during the development and passage of legislation worldwide.
- Education of regulators on issues important to the members of each organization.

### **PUBLICATIONS**

Recognizing that electronic and print publications are a primary means of disseminating new technologies, trends and practices, ASHRAE and CIBSE agree to:

Provide at least one complimentary subscription of the primary membership periodical to be received at the headquarters location of the other organization.

Explore opportunities to jointly produce publications of mutual benefit. Of particular interest are publications on emerging topics such as digital technologies, resiliency, and environmentally transmitted pathogens.

Cross-market each organization's publications where appropriate and with industry standard distributor discounts.

Use periodicals, websites and social media to promote the other organization's events, publications and other activities.

Explore mutually beneficial ways to translate ASHRAE and CIBSE publications for distribution around the globe.

## **EDUCATION**

As leading providers of conventional and online educational services and in recognition of the vital role professional development has for our respective members, and society at large, ASHRAE and CIBSE agree to:

- Cross-market educational offerings at the national and international levels.
- Explore opportunities to co-develop new courses worldwide or other training programs that take advantage of overlapping and complementary expertise between ASHRAE and CIBSE.
- Investigate and implement ways that certifications programs can be jointly developed or administered.

## **TECHNICAL ACTIVITIES COORDINATION**

ASHRAE and CIBSE agree to foster technical cooperation in areas of common interest by:

- Encouraging members in each organization to participate on technical committees and task forces.
- Providing opportunities to participate in, and comment on, proposed standards, guidelines, policies, and position statements developed on technical subjects as they relate to buildings and community developments.
- Investigate the development of ASHRAE-CIBSE jointly-sponsored worldwide standards
- Establishing liaison representatives to key technical committees where mutually beneficial to do so.

## **RESEARCH**

Recognizing the importance research plays in accelerating the transformation to a more sustainable built environment, ASHRAE and CIBSE agree to jointly:

- Promote research in areas where research results will advance the arts and sciences of building engineering.
- Disseminate research results quickly, focusing on high-impact findings.
- Identify opportunities for research funding from other sources and mutual support to draw from these resources.

## **ADMINISTRATIVE CONTACTS**

The administrative contacts for actions tied to this SPA shall be:

### **For ASHRAE:**

Jeff Littleton  
Executive Vice President  
ASHRAE  
180 Technology Parkway  
Peachtree Corners, GA 30092  
Tel: 404-636-8400  
Email: [jlittleton@ashrae.org](mailto:jlittleton@ashrae.org)

### **For CIBSE:**

Stephen Matthews  
Chief Executive/Secretary  
CIBSE  
222 Balham High Road  
London SW12 9BA  
Tel: +44 (0)20 8675 5211  
Email: [smatthews@cibse.org](mailto:smatthews@cibse.org)

**TERMINATION**

Either party may terminate this agreement, with or without stated cause, upon providing the other party with thirty (30) days written notice of intent to terminate.

**TERM**

The term of this agreement shall begin when signed by both parties and shall terminate at the end of three (3) years unless extended at that time by written agreement.

**LEGAL STANDING**

This agreement reflects a commitment by ASHRAE and CIBSE to continue and enhance their working relationship and individual efforts toward achieving mutual objectives described above. It does not create a binding obligation or legal agreement between the two organizations, and neither organization has an obligation to negotiate toward or enter into a binding written agreement. In addition, this agreement does not create a partnership, joint venture, fiduciary relationship or similar relationship between ASHRAE and CIBSE. Furthermore, it is understood that this agreement is conceived as a dynamic document, meant to change as circumstances and priorities warrant. It may be modified or amended by written agreement between both organizations.

**FOR ASHRAE**

**Charles E. Gullledge, III**  
**ASHRAE President, 2020-2021**



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Signature

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December 4, 2020

**FOR CIBSE**

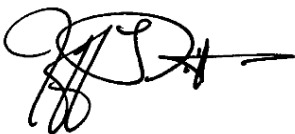
**Stuart MacPherson**  
**CIBSE President, 2020-2021**



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Signature

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December 4, 2020

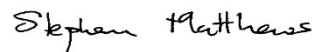
**Jeff Littleton**  
**Executive Vice President**



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Signature

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December 4, 2020

**Stephen Matthews**  
**Chief Executive/Secretary**



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Signature

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December 4, 2020