

Northern New England American Institute of Architects (AIA) Committee on the Environment (COTE) Leadership Summit

June 4 & 5, 2015

Portland, ME

THE NORTHERN NEW ENGLAND AIA COTE LEADERSHIP SUMMIT IS A COLLABORATION OF AIA COTE GROUPS FROM MAINE, BOSTON, NEW HAMPSHIRE AND VERMONT.









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A. EXECUTIVE SUMMARY: THE BIG PICTURE

"We are on the threshold of the most significant change known to human history."

- Bob Berkebile

On June 5, 2015, 100 leaders of the Northern New England AIA design community came together in Portland, Maine to discuss how building design can be a major leverage point for addressing global climate change and how the Northern New England design community can advance towards achieving the Architecture 2030 vision of carbon neutral buildings by 2030.

We were guided throughout the day by the compelling stories and experienced insight of Bob Berkebile, who with his firm BNIM has been pushing the envelope on green design and development since before the time of LEED certification. Bob is the founding chairman of the American Institute of Architect's (AIA) National Committee on the Environment (COTE) and so it is fitting that he kicked off this regional AIA COTE Summit with words to inspire and incite us to take action.

Bob started the event with an evening lecture at the Portland Museum of Art and shared stories from his work in post-disaster environments. His experience shows that natural disasters provide opportunities for new community conversations and extraordinary change. For example, we heard about the City of Greensburg, Kansas that was devastated in a tornado and how Bob and his team brought the community together for conversations about what it was about Greensburg that they loved – what limited them - and what they wanted to create that would make it better. The result of these conversations was a city that was rebuilt following complete devastation to a thriving green city (the first city in America to make LEED Platinum its standard).

"The larger disaster," he said, "is our limited thinking and the resulting failure of human systems everywhere."

The trick, he explained, is to raise and address these important questions before nature informs us of our failures through natural disaster.

This executive summary is paraphrased from Bob Berkebile's address given at the 2015 Northern New England AIA COTE Summit:

Former U.S. Treasury Secretary Hank Paulson has said that climate change is a much greater risk to this country than the economic crash of 2008. The science is clear that increasing amounts of greenhouse gas emissions are accelerating global climate change and further delay in addressing this critical issue is

reckless. But addressing climate change now brings great opportunities for redefining our economy, natural capital and human resilience.

Climate change provides the architectural community with the most exciting design challenge in human history. Through how we design, we can change the outcome. Buildings are the number one source of greenhouse gas emissions and therefore building designers hold the keys to a solution.

Now is the time for transformative change. Many great thinkers are saying that we are entering into a new age that is more sustainable and vital – the "Planetary Age" – but we must be aware that getting there will likely involve disruption.

We started down the path toward greener buildings with the introduction of LEED certification. The early assumption made by the design community was that broad use of LEED certification would change the building industry, which has proven to be true. However the industry-wide program required reducing LEED certification to doing less damage to the environment – not stopping the damage or adding new vitality. Extraordinary changes have occurred in the way we approach design because of LEED; it gave us a roadmap forward and stimulated innovations in design. New models of green building that are regenerative offer tangible promise that we can reach the goal of carbon neutral buildings by 2030.

The design community's only major limitation to achieving carbon neutral buildings is our mindset. With a common view of what is important we can transform our industry and change the world. Let us make 2020 be the year of "perfect vision," accelerating our path forward with clarity and certainty.

Now is the time for a significant course change in how we design and build; and this change must be transformative. People are frustrated with the old models and want a new approach. The design community can be the kamikazi ("divine wind") that blows through and changes the game. With regenerative and loving strategies, design professionals are able to create stronger communities and a more sustainable world.

B. INTRODUCTION

The idea to hold a regional meeting of the Northern New England COTE committees began in Maine, after a successful AIA+2030 Professional Series in 2013. The purpose of the series, offered by many AIA chapters throughout the country, is to help design professionals to create buildings that meet the energy efficiency goals of the 2030 Challenge. The series was educational and interesting, but left us wanting more.

Gunnar Hubbard, Co-Chair of Maine AIA COTE and a Principal at Thornton Tomasetti, kicked the working sessions off by stating, "all of us collectively know that we can do better and want to do better to improve our built environment." We can improve our personal conviction; our firm's approach; our skills; our approach to marketing and communications; and how we analyze and use the metrics.

We decided we needed to have a greater impact. The Maine AIA COTE committee reached out to the other AIA chapters in Northern New England and found unanimous support for an event that would bring us all together to explore achieving the vision of carbon neutral buildings by 2030. We decided to organize a one-day event with the goals of providing a safe and candid forum for networking and discussion, and to learn about and share strategies.

The Summit was not envisioned to be a conference that would only enable broad discussion. Instead, we held an invite-only event that brought together 20-25 leaders in the design community from each state to discuss how we can meet or exceed the Architecture 2030 Challenge. We brought together the leading design firms in the region to take a good look at ourselves and at our profession.

We found the event to be affirming and inspirational and a way forward towards achieving the 2030 goals. We discovered that we all share a desire to have a greater impact than provided by the status quo in our profession and learned about what our colleagues in other firms and states are doing to strive for sustainability in their projects and their workplace. We are left with a strong interest in continuing to come together on an annual basis to delve deeper into the strategies and actions that will contribute to the change we want to see.

We hope that this event is a springboard for future conversations for the region but also for regional AIA COTE summits in other locations. Climate change is too large an issue to tackle in a small way; collaboration, networking, and the sharing of information are essential to leveraging the combined expertise and passion of our profession and for creating transformative change.

C. DISCUSSION TOPICS

PART 1: WHERE DO WE WANT TO GO?

In these discussions, we explored our end goals and how far we are on the path towards achievement of these goals. We talked about wanting to achieve sustainability performance across our firms, so that we can move beyond a few exemplary green projects to having sustainability built in to our organizations and culture so sustainability becomes the way of doing business. We discussed the value and challenges of measurement and what the data currently shows regarding progress in the industry towards the 2030 goal.

a. An Honest Look in the Mirror: SPI Green Firm Assessment

The <u>Sustainable Performance Institute's</u> (SPI) Green Firm Assessment examines the capacity of an entire firm to deliver sustainable design. The assessment looks at the success factors that distinguish the truly capable firms from the rest. These factors include strong leadership; clear and measurable goals; effective strategies to meet these goals over time; and systems, tools and processes that optimize project delivery, collaboration, and capacity building to ensure that all staff can produce consistent, high quality results. The SPI Certification was created to provide the quality control and metrics at an organizational level that show how committed a firm truly is and how effectively they've translated that commitment into reliable capability. The assessment is the first step towards certification: know where you are and where you need to go.

"It is easy to achieve a successful green building project, but what about your entire portfolio?," asked Barbra Batshalom, founder of the Sustainability Performance Institute who kicked off the working sessions by introducing the SPI Green Firm Assessment.

While the firms represented in the room all faired a bit differently in the assessment, the shared discovery was that most of us were trying to achieve at least some of the success factors but no one had achieved all of them. Many firms were engaged in random acts of sustainability but few were taking a comprehensive approach.

Several themes emerged from the discussion following this exercise:

Be Proactive with Clients:

We offer sustainability service when our clients want it and pay us to do it. Sustainability is seen as an additional service, and we need to change the mind-set so that sustainability becomes an integral service. We can consider being more proactive with clients by presenting higher sustainability goals in proposals,

and being able to say "no" to projects that are not consistent with our vision of sustainability. We may see better results if we use our marketing to set expectations and work with our clients to build objectives and goals and have good follow-up; we should hold our clients accountable to their decisions. LEED v.4 could provide an opportunity to push higher sustainability goals.

Improve Measurements:

We agree that measurement is a powerful tool for change but we run up against the barriers of time, money, and generational issues. We need to know how our buildings fall short and to be monitoring their energy performance, and to track post-completion metrics. The AIA 2030 Commitment asks us to benchmark and get data, and to learn from our buildings, but we do not get a fee for this additional work. We could be better at measurement if we simplify the processes of monitoring and analysis. We could also be tracking office data in order to make our internal processes more visible to employees.

Make It Financially Sustainable:

Small firms are challenged financially with doing anything additional to what clients are requesting. How do we do this and make money?

Build Your Organizational Culture:

Organizational culture at our firms does not always support sustainability. Solutions include: Build your team consciously for sustainability. Depend on younger staff to get it and on older staff to sell it. Consider hiring a sustainability director to help build organizational culture, and adopt a goal for your firm for sustainability to be integrated into the design process.

We have Success Stories:

We can celebrate what we've already accomplished and learn from what others have done. Participants shared stories about firm-wide greenhouse gas and waste audits; employee-owned cooperatives; bringing new staff to visit projects; leadership talks and other ways we are "emerging" towards meeting the success factors covered in the SPI assessment.

b. Tracking Our Progress: The AIA 2030 Commitment

The <u>AIA 2030 Commitment</u> is a national initiative that provides a consistent framework with simple metrics and a standardized reporting format to help firms evaluate the impact design decisions have on an individual project's energy performance. The Commitment is AIA's response to the Architecture 2030 Challenge for all new buildings, developments, and major renovations to be carbon-neutral by 2030. Firms are invited to join the Commitment and annually report on their progress towards carbon-neutral buildings.

Andrea Love, Director of Building Science at Payette Associates, shared data from the most recent progress report of the Commitment and information about the new reporting platform, the DDX. The reporting data shows that although firms are contributing to a decline in energy use, the majority of projects are not meeting the 2030 Challenge goals.

Andrea asked the group three questions to consider:

- How can we see some of the changes we hope to have?
- What can we do with this data?
- How can we bring others along?

The group's discussion on the AIA 2030 Commitment is summarized below:

It is easy for some firms to report:

Reporting is not difficult for firms already doing energy modeling. Data entry can be time consuming, but interns can assist in this process.

It is difficult for other firms to report:

Time and money are barriers to reporting. Lack of modeling experience can also keep firms from reporting. Firms may not join due to fears about not being able to fulfill their commitment or fears of exposing "bad" projects (the AIA does not share data on individual projects). Reporting is often supported by overhead and is therefore seen as "yet another thing on the pile," especially by smaller firms.

New tools could assist reporting:

A project based reporting tool, which could be filled out while working on each project, could make reporting more accessible than filling out a database. Firms unable to do the reporting themselves can hire data consultants.

Connect the data to the design process:

The data provided to the Commitment should be used to inform the design process so that we can progress more intentionally towards the 2030 vision.

We may be looking at the wrong data:

We could be analyzing actual building data rather than modeled performance. It is not difficult to get real data. Also, we could look at total energy use, not the net after renewables.

PART 2: HOW DO WE GET THERE?

In order to achieve the vision of carbon neutral buildings by 2030, we need to have a purposeful and strategic approach to how we do business. This involves how we work with our clients, use tools and technology that assist in sustainable design, market our services in a way that attracts the "right" clients and also helps clients to see the benefits of sustainable design, and nurture the talent within our staff so that we can excel in our work. A majority of our day together was spent exploring these issues.

a. Working with Clients

Roundtable discussions explored a variety of issues regarding working with clients to advance a sustainability agenda. Topics included expectations of clients; design fees; design teams; green building certifications; and economics. Several suggestions and themes were repeated across conversations - these are summarized below.

Know your client.

Many clients are more interested in energy performance than certifications. Using the word "sustainability" may not be how to persuade your client, consider your client's motivations and challenge their assumptions. Educate early and often. Realize that numbers are weak persuasion tools, appeal to emotions. Find the green champion among your client's representatives.

Do what you can without clients requesting it.

Provide the low-hanging fruit and whatever can be done inexpensively early in design without having to ask for the client's approval. Embed smaller goals for energy performance. Raise the bar - make sustainability analysis just a regular service, rather than a "green" service, to level the field. Empower the team to create responsible design rather than just checking the boxes for a certification. Help clients form goals that will give them long-term value. Be proactive rather than reactive.

Align contracts with the work.

Consider ways to align fee with expanded scope of services and come up with a different financial paradigm such as offering clients a fee based on building performance. Include the post-occupancy phase. Clients do not always understand what they are getting for the fee. What we tend to do now to support extra sustainability services is to take the budget from a profitable project and apply it to the less profitable project.

Certifications are not enough.

It is possible that a client's goal of certification takes the place of the pursuit of responsible design. We do not want to just be satisfying a checklist. Once the building is certified, coming back to check on the building operations is valuable. Should the money put towards getting a building certified be spent instead on enhanced commissioning and other items that further responsible design? There are always new certifications; how much should firms invest in learning these certifications when everything is always changing?

Policy change can be helpful.

Carbon accounting can contribute to policy change. Codes should be improved.

b. Tools and Technology

A myriad of building energy software tools are now available for sustainable design. There are tools that can provide whole building analysis through energy simulations, load calculations, renewable energy analysis, and retrofit analysis. There is software to simulate envelope systems, HVAC equipment and systems, and lighting systems. There are specific tools that can provide analysis of indoor air quality, the climate, ventilation, water use and other areas important to sustainable design. A listing of these tools is available on the <u>Department of Energy's web site</u>. These tools vary in regards to complexity and ease of use, and some tools are available for free such as eQuest and WUFI Passive. And some common ones for pay are a few programs such as Sefaira, IES-VE, Green Building Studio and Design Builder

Roundtable discussions explored the tools and technology available to help facilitate sustainable design and the issues around the use of new tools for energy analysis. The discussion is summarized below.

Our firms do not always need to do the energy modeling ourselves.

We don't always need to do in-house modeling if we don't have the expertise or time. While modeling provides significant advantages, small firms may choose to outsource energy modeling to sustainability consultants, energy analysts, and mechanical engineers who will run multiple different scenarios – we would have to learn how to do this in a nimble way if we did it ourselves. However, a base level of energy modeling provides significant advantages and should be considered in-house.

The right software can be helpful.

We should use the simplest model that meets the need and the right software to model all the different choices. It would be helpful to have a tool that accesses the actual energy stats. There is usually not one right tool but a basket of useful tools.

Look to emerging leaders at your firm to know the technology.

Younger staff often know the new technology better, and this is a leadership opportunity for them.

Let's not forget the value of experience.

Experienced design teams know the fundamentals of passive design, which is not so dependent on tools. The best approach is to balance this experience with the new technology.

We need AIA to update fee structures to reflect current reality.

What is the return for us if we use energy analysis tools, which cost extra time and money? The design process has changed but fee structures have not. We need AIA to step up and address this issue.

c. Marketing

A discussion about marketing our services was kicked off by Jim Kent, Chief Communications Officer at Thornton Tomasetti. Jim told us that we had a "solution in search of a market." While marketing is often self-promotion, Jim urged the group to change our marketing intentions to be more educational so that we can create new customers. "Marketing + innovation," said Jim, "creates a customer."

Roundtable discussions explored this idea of changing our marketing intentions, and below is a summary of the ideas that came from this discussion:

Do we have to avoid using the word "sustainability?"

We don't have to market using this word. Instead, we can use the data to show the trends and to prove that a better performing building is a better investment. We can talk about improving the design process. Or, should we bravely discuss our values and not hide that "sustainability" is an important goal in itself?

Some forms of marketing are more engaging.

Capture people's attention by thinking outside the box and using videos and other multi-media to communicate your marketing message. Even dynamic modeling can serve as a marketing tool. Social media and external recognition, such as awards, is useful for marketing.

Can the AIA 2030 Commitment be marketed?

Can we market our involvement in the Commitment? The AIA could make it more desirable and create higher value for it. It can help to differentiate our firms.

Knowing our clients and ourselves is a first step.

Express what we are passionate about and connect this passion to what the client cares about. If we know who our ideal client is, then we can find that client. Marketing attracts the clients that we want. Knowing ourselves may involve building the culture within our organizations. Can we exclude clients who don't share our values?

Be visible thought leaders.

Being a thought leader includes communicating to the client the importance of this kind of work. Get engaged with communities and be a thought leader to share your values.

d. Talent Management

The topic of talent rounded out the discussions of tools and approaches that can help us to move towards the 2030 vision. These discussions centered on attracting and retaining design talent, the key sustainable design competencies, and how to create a culture in our organizations in support of the 2030 goal. We discussed how to go about creating these opportunities, summarized below:

Partnering staff for mentoring

Leadership can come from anywhere in your staff. Grow this leadership by partnering younger staff with senior staff, and specialists with generalists. Mentorship and firm growth are related.

<u>Training and continuous learning is important</u>

Schools and office experiences vary widely and therefore training is important, as is staff empowerment and continuous learning. Firms should have a central repository for educational information.

Hire the right staff

To move forward a sustainability agenda, we need to hire staff with vision and let them inspire the entire firm.

D. CONSIDERATIONS

1. For Architecture

As eloquently put by Bob Berkebile, we are at the threshold of the most significant change known to human history because of anthropogenic climate change. This change offers great opportunity for architecture and may be "the most exciting design challenge ever." Although there are individual architects who have embraced this challenge, the architecture field as a whole is lagging behind as evidenced by the fact that the average AIA 2030 Commitment submission is at or below present code. We also learned through taking the Sustainable Performance Institute's green firm assessment that the design community still has many steps to take towards building true capability for weaving sustainability through the entire design portfolio. These challenges are not insurmountable but do require the design community to share a common view of what is important and to work together on an unabashed push for transformative change.

2. For the Region

Participants agreed that the greatest value of the Summit was that the event brought the region together so we could learn from each other and network across states. We should continue to come together across the region on an annual basis to delve deeper into strategies that will move us together closer towards the 2030 goal.

One participant made the comment that we are in a region that is "beyond LEED," beyond caring just about the economics and able to consider the value system. While all participants may not feel that their firms are "beyond LEED," what we can all agree on is that we are in a region where there is an awareness and values for sustainability, where clients and architects have been willing and interested in pushing the envelope on sustainable design. Together as a region, we can work with each other to capture the interest that is already here and see it result in higher performing buildings and communities.

Across the states, in addition to having regular opportunities for the sharing of information and strategic discussions, we can develop cross-state opportunities for mentoring and training to increase the capacity of our region to deliver on shared values.

3. For the Chapters

We recommend and encourage AIA Chapters in other regions to begin a similar conversation between their states by holding AIA COTE Summits. Transformative

change requires these frank and open conversations across state boundaries, and our experience in Northern New England was positive and can serve as a model.

Participants suggested specific assistance that the Chapters could provide to help increase the knowledge and skills of the members towards achieving the 2030 vision. Energy modeling, identified to be a bit of a slippery fish for most of the architecture firms in Northern New England, was identified as an important tool, but firms need better access to energy modeling and tools for improving measurement. We learned that not many firms are reporting to the AIA 2030 Commitment, especially not the kind of small firms that make up the majority of firms in our region. Chapters can provide assistance to enable more firms to join the Commitment and to be reporting members, so that we can move intentionally towards the 2030 vision. Chapters can also market the 2030 Commitment, reducing the apprehension and misunderstanding that may be keeping firms from joining.

We need help from the Chapters to align our fees with an expanded scope that would include the most important sustainability services. We need updated AIA fee structures and assistance with marketing our services in a way that enables firms to find clients who share our values. We would like to see more success stories showing that sustainable design resulted in good financial outcomes for the clients and the architect, and the Chapters can gather and share these stories.

4. For Individuals

Most of the individuals who attended the Summit felt inspired by the event and were passionate about wanting to bring about change through their individual actions. Participants seemed to share a commitment to have courage and passion drive our work and to widen the conversation beyond the participant group to our firms and to communities.

<u>Immediate Next Steps:</u>

Participants were asked to envision individual actions they could take in the short-term and longer-term. During the closing session, they were asked to write down what they were going to do on Monday morning. Some planned to speak their mind about their values and the urgency of transformation. Others were inspired to go back their firms and develop mission statements, set goals for the office culture, and consider how to score higher on the SPI green firm assessment. Participants wanted to join the Architecture 2030 Challenge and the AIA 2030 Commitment and find better processes for tracking projects. For some, the first step was to find the best clients and create a "red list" to identify what products are so harmful that they should be avoided. Monday morning

tasks also included trying to learn more about energy modeling, engage or reengage with networks that were working toward similar goals, and to consider philanthropy.

Before 2020:

Participants plotted on a timeline actions and changes they would like to see in the nearer-term, to take place before 2020. Many participants either described changes they would like to see at their firm or in their communities, or envisioned better metrics, tracking, and improvement in the overall performance of their work. Some called for more political action and transparency and to tell stories and give presentations to create a market for change. There were some participants who had very specific actions planned, such a starting a 2030 district in their cities; using their firm's marketing budget for philanthropy; or working with specific architecture associations for inspiring actions.

Between 2020 - 2030:

Looking ahead towards reaching the 2030 goal of carbon neutral buildings, the participants shared their hopes for what they would like to be doing as individuals and for what they would like to see for their firms and communities after 2020. Most participants wanted to see themselves and others acting as change agents and being a part of the transformation. They wanted to share in a collective narrative that demonstrates the value and opportunity of the 2030 vision, and to have younger staff helping to create the vision. By 2020, the hope was that they could be creating their customer rather than only responding to clients and even refusing projects that do not meet minimum thresholds. A few participants envisioned energy modeling as a standard procedure early in the design process.

E. CONCLUSION

In conclusion, the 2015 Northern New England AIA COTE Summit provided inspiration, camaraderie, and some tangible actions that can assist the individual participants and their firms to realize more sustainable projects and move in the direction of the 2030 vision of carbon neutral buildings. The next step is to plan for the 2016 NNE COTE Summit in order to work together to identify specific strategies that can be employed by firms in Northern New England.

The Summit provided a sense of community with our regional colleagues and made us aware that we are all dealing with similar issues. We left with a sense of hope for real transformation in the industry, knowing that "we will see it when we believe it." And for those days ahead where the challenge may seem too hard, we are inspired by the idea that "we don't stop playing because we get old; we get old because we stop playing."

One participant offered, "I do not know how to be this good an architect yet." Working together, we can raise ourselves and our firms to a level that improves not only our projects but also ourselves as professionals in a field that at this time has a window of opportunity to prove itself outstanding.

F. APPENDIX

Northern New England AIA COTE Leadership Summit Survey

Following the Summit, a survey was sent to all participants. 43% of participants participated in the survey.

A majority of the survey participants were positive about their experience at the Summit and viewed the event as part of an on-going dialogue about how members of the design community can provide leadership towards climate neutral buildings. There was clear interest in continuing the dialogue, both among the larger professional community throughout the year and among a focused group through formal gatherings. Looking ahead to future events, participants want more attention placed on practical applications and solutions; more relevance for the needs of small firms; and increasing attention on the big issues and getting past the current challenges so we can set a higher bar for the profession and ourselves.

Participants provided their ideas for topics to discuss at the next Summit:

- Regulations and codes; and lobbying
- Specific modeling tools and how to use energy modeling
- Energy modeling for low-budget projects
- AIA 2030 Commitment how-tos
- More on messaging and team building approaches
- Emerging technologies
- Working better with consultants
- Managing projects effectively
- Making sustainable design more valuable to consumers
- Sharing of concrete tools for use in professional practice
- Corporate responsibility
- Focus on specific region

<u>Survey Responses: Event Topics and Substance</u>

I found the subject matter relevant to my profession.

100% Strongly Agree or Agree

The speakers were credible and informed.

100% Strongly Agree or Agree

Before attending this event, I was aware of my local COTE chapter leadership, initiatives, and meeting schedules.

22% Strongly Disagree or Agree

Are you going to continue the discussion locally, within your committee or your firm?

100% Yes

Would you participate if the summit is offered again next year?

98% Yes

Survey Responses: Logistics

The format and organization of the event were successful. 98% Strongly Agree or Agree

There was sufficient networking time. 90% Strongly Agree or Agree

How would you rate the venue/location? 70% Excellent or Very Good

How was the schedule, flow, and duration of overall summit and individual topic discussions?

90% Excellent or Very Good

What location would you suggest for a future summit?
43% No suggestion, others split between locations

Was this a good time of year for a potential future summit? 90% Yes

Was the duration of this event a good model for a potential future summit?

95% Yes

Would you like to be involved in planning a future summit? 28% Yes

Participants

Rachelle Ain Bruner/Cott & Associates

Shannon Alther TMS Architects

Tyler Barter Oak Point Associates

Barbra Batshalom Sustainable Performance Institute

Naomi Beal PassivhausMAINE Alan Benoit Sustainable Design Bob Berkebile BNIM Architects

Christopher Briley Briburn

Steven Burke Symmes Maini McKee Associates [SMMA]

Jean Carroon Goody Clancy

Joseph Cincotta LineSync Architecture

J.B. Clancy Albert, Righter & Tittmann, Architects, Inc

Ron Conterio A.W Hastings

Emma Corbalan Jacobs Global Buildings

Patrick Costin Canal 5 Studio
Carolyn Day Ellenzweig

Richard Deane TruexCullins Architecture + Interior Design
Jacob Deva Racusin New Frameworks Natural Design/Build
John Doane John Q. Doane, Architect, Center Studio

Mark Dolny ARC

David Ely Windy Hill Associates
Gavin Engler Carol A. Wilson Architect
Jason Forney Bruner/Cott & Associates

Jeff Galvin Lavallee Brensinger Architects

Philippe Genereux Symmes Maini McKee Associates [SMMA]

Chris Gordon Vermont Energy Investment Corp.

John Gordon John Gordon | Architect

Art Guadano AG Architects, PC

Jonathan Halle Warrenstreet Architects, Inc

Bruce Hamilton Bruce Ronayne Hamilton Architects Inc.

Tom Hartman Coldham & Hartman Architects

Amy Hattan Thornton Tomasetti
Greg Havens Sasaki Associates, Inc.
Pamela Hawkes Scattergood Design
Joe Hemes HEMESphere Design LLC

John Hession New Hampshire Home Magazine

Alison Hollingsworth VEIC

Stephanie Horowitz ZeroEnergy Design

Gunnar Hubbard ThorntonTomasetti

Nicholas Isaak Pro Con Inc.

Carolyn Isaak AIA NH

Blake Jackson Tsoi/Kobus & Associates

Mike Johanning WBRC Architects · Engineers

Judy Johnson Harriman

Jim Kent Thornton Tomasetti

Andrea Kerz-Murray Vermont Integrated Architecture, P.C.

Diantha Korzun GBA (gossens bachman architecture)

Alan Kuniholm PDT Architects

Jason LaCombe SMP Architecture

Ron Lamarre Lavallee Brensinger Architects

Grey Lee USGBC Massachusetts
Tarica Leskiw TRO Jung | Brannen

Paul Leveille Resilient Buildings Group / The Jordan Institute

Chin Lin HMFH Architects, Inc.

Andrea Love Payette

Ian MacDonald Allied Engineering, Inc.
Bill Maclay Maclay Architects

David Matero David Matero Architecture

Luka Matutinovic WSP Built Ecology

Steven McHenry McHenry Architecture PLLC

Dennis Mires Dennis Mires, P.A., The Architects

Mark Moeller JSA Inc Kate Mora Architerra

Eric Morrow Dore & Whittier Architects

Brian Murphy Manypenny Murphy Architecture

Matt Napolitan Cx Associates

Megan Nedzinski Maclay Architects

Jim Newman Linnean Solutions

Conor O'Brien Johns Manville

Michelle Oishi cbt architects

Sheldon Pennoyer Sheldon Pennoyer architect s

James Petersen Petersen Engineering, Inc.

Michael Petrovick Catlin + Petrovick Architects, PC

David Pill Pill - Maharam Architects

Jay Purcell J L Purcell Architects

Richard Renner | Architects

Suzanne Robinson Vanderweil Engineers

Nicole Rogers SMRT

Steve Roy Wiemann Lamphere Architects

Jeannette Schram AIA Maine

Andy Shapiro Energy Balance, Inc.
Scott Simons Scott Simons Architects

Jim Stanislaski Gensler

Kate Stephenson Yestermorrow Design/Build School

Douglas Stewart SISR Architecture
Cathy Streifel Thornton Tomasetti

Jesse Thompson Kaplan Thompson Architects

Rob Tillotson Oak Point Associates
Matthew Tonello Consigli Construction

Mark Vincello WV Engineering Associates, PA

Randall Walter Bensonwood Benedict Walter CWS Architects

Ellen Watts Architerra Katie Wetherbee Harriman

Christopher Williams Christopher P Williams Architects, PLLC

Jim Williams Williams + Frehsee, Inc.
Carol Wilson Carol A. Wilson Architect

Michael Wisniewski Duncan • Wisniewski Architecture

VernonWoodworthAKF GroupAllisonZuchmanPDT Architects

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Contributors













