
Code Adoption Process Checklist Para-Technical

Adoption of Code Effective Date _____
Responsible Chief _____
Policy Analyst _____
Support Staff: _____
 ~ Boards Coordinator _____
 ~ Rules Coordinator _____

Pre-meeting

- Meeting should include following staff: PTS Manager, PTS Assistant Manager, Program Manager, Chief, Policy Analyst, Rules Coordinator, Boards Coordinator, Para-Technical, additional technical staff as needed.
- Establish timelines for code adoption and rulemaking based on national code availability date of _____ (allow at least 14 months for most code adoptions; elevator and boiler codes may require less time) *(see example 1)*
- Determine if code books or reference materials will be purchased for committee or board members

**Note: code preparation process can begin now - Includes developing code matrix, proposed code changes, review of Oregon amendments, etc.*

45-day notice – The 45-day notice is the time period when the public can submit code amendment proposals for the code being considered. Once 45-day notice expires, no other code proposals will be accepted *(see example 2)*

- Note on electronic calendar when 45-day notice expires
- Para-Technical or Policy Analyst develops communication piece
 - Communication piece must be approved using the electronic review loop process; Send communication piece to: Program Manager if applicable, Chief, Policy Analyst, PTS Manager, Code Para-Technical (in this order)
- Convert approved notice into pdf document *(see example 3 of how to convert from a word to a pdf document)*
- Web communication
 - E-mail Webmaster 45-day notice in pdf format, Web link of where notice needs to be posted (public notice Web page under general notices, program page), and request to send “notify” to stakeholders and interested parties *(see example 4)*
 - E-mail Policy Analyst requesting an article to be drafted explaining the 45-day notice for inclusion in the next Building Department Newsletter.
 - E-mail either Building Officials or Department Newsletter using one of the two following methods:
 - ◇ E-mail link of where 45-day notice is posted for PTS Administrative Assistant to send a special email to Building Officials *(see example 5a)*

- ◇ E-mail Training & Public Affairs Coordinator article and pdf of 45-day notice for inclusion in the next Building Department Newsletter. Include link of where notice is currently posted. *Deciding which e-mail method to use depends on when the next Newsletter is scheduled to be posted.*
(see example 5b)
 - Para-Technical emails PTS Administrative Assistant to remove notice from Public Notices Web page after 45 days
 - Chief and Policy Analyst begin code preparation process (see Code Preparation section below)

- Code preparation (begin process during 45-day notification time period)
 - If needed, Para-Technical requests electronic version of model code from publisher (make sure electronic version is compatible with division's computer system)
 - PTS staff creates matrix template for listing division proposed code changes (see example 6)
 - Chief and/or Policy Analyst reviews national code, Oregon code, Oregon amendments, Oregon Administrative Rule, Statewide Alternate Methods, Statewide Code Interpretations and any code proposals received; and develops recommendations and proposed language to be placed on matrix
 - If an external customer's code proposal is rejected per 918-008-0060, Para-Technical will send letter or email notifying customer that their proposal has been rejected (see example 7)
 - Para-Technical and other PTS staff ensures code documents are complete and ready to be sent to code committee for review one week prior to first meeting
 - Para-Technical requests Webmaster to post code matrix and other pertinent code information to committee web page and requests that "notify" be sent (see example 8)
 - Para-Technical submits information about code matrix and other pertinent code information to PTS Administrative Assistant and Public Affairs Coordinator for an article in the Building Department Newsletter (refer back to example 5a&b)

- Code Proposals (received during the 45-day notice period)
 - Para-Technical assigns each proposal a number (numbered in order received)
 - Each proponent is sent a letter or e-mail acknowledging receipt of their proposal (see example 9)

- Stakeholder letter – This is a letter that invites individuals to participate on the code committee
 - Para-Technical creates draft code committee member solicitation, "Stakeholder Letter" and sends through internal review loop (Policy Analyst and PTS Manger) (see example 10)
 - Once stakeholder letter is approved, Para-Technical sends letter via email to division stakeholders and applicable board email group for code committee member solicitation (letter may have varying response deadlines, standard deadline is 14 days)
 - Para-Technical will need to note on electronic calendar response deadline
 - Para-Technical creates spreadsheet to track potential committee members
 - After response deadline, Para-Technical gives PTS Manger, Program Manager and Chief list of potential committee members to review and select
 - PTS Manager will review approved list with Administrator for final approval

- ❑ Create code committee Web page (created during the stakeholder letter response timeframe)
 - Para-Technical emails Webmaster with the sections and language needed for committee Web page
 - Web page outline *(see example 11)*
 - ◇ Purpose
 - ◇ Members
 - ◇ Notices, Agendas, Meeting Minutes, and Video archive
 - Links (table of contents) *(see example 12)*
 - ◇ Notify (customers use this link to sign up for electronic notifications)
 - ◇ Committee members
 - ◇ Code matrix
 - ◇ Notices, Agendas, Meeting Minutes, and Video archive
 - ◇ Submitted code proposals
 - ◇ Live video streaming icon

- ❑ Create code committee (based on approved list of members)
 - Para-Technical creates acceptance letter and committee rosters and sends via email to selected code committee members confirming participation *(see example 13)*
 - Para-Technical creates “so sorry letter” and sends to those not selected to as committee members and adds them to the interested parties list
 - Para-Technical creates code committee and interested parties email address book

- ❑ Scheduling code committee meetings
 - Para-Technical selects committee meeting date(s) based on division staff and Conference Room A availability
 - Email code committee members selected meeting dates with a response deadline, asking for their availability *(see example 14)*
 - Send email to committee confirming the meeting date, indicating an agenda, code information, and matrix will be sent out shortly *(see example 15)*

- ❑ Code committee meeting preparation
 - PTS Manager, Chief, and Para-Technical, establish meeting agendas *(see example 16)*
 - Send agenda and supporting documents to committee a few days prior to the meeting, asking for confirmation of their attendance *(see example 17)*
 - Send agenda to interested parties list
 - Para-Technical notifies code proponents of the exact meeting at which their proposals will be considered by the committee
 - Requests Webmaster to post agenda to Public Notices and Committee Web page and send “notify” to interested parties *(see example 18)*
 - Para-Technical submits information about next meeting to PTS Administrative Assistant for Building Department Newsletter *(see example 19)*

- Arrange for internal staff to help with video streaming during the meeting by sending a meeting appointment to:
 - Administrative support
 - Webmaster and cc FABS Manager's Assistant who notifies
- For first meeting, Para-Technical assembles binder for committee members and staff containing all meeting materials
 - Timeline (internal and external)
 - Matrix
 - Code language
 - Code proposals
 - Statewide Alternate Methods
 - Statewide Code Interpretations
 - Exhibits
 - Committee roster
- For every meeting, Para-Technical assembles packet for committee members and staff; makes extra copies for guests
 - Agenda
 - Updated matrix
 - Handouts (code, statutes, rules, exhibits, or minutes)
- Para-Technical prepares the following items prior to the meeting *(see example 20)*
 - Name place cards
 - Seating chart
 - Door sign
 - Sign-in sheet
 - Create document for minutes
 - Slates (using ToastMaster equipment)
 - "Roll call" sheet
- Para-Technical schedules a "pre-committee meeting" the day before the committee meeting with internal staff, to discuss agenda items
- Para-Technical prepares the day of the meeting
 - Turn on ToastMaster equipment to "warm" it up *(see ToastMaster procedure manual)*
 - ◇ Turn on power strip
 - ◇ Turn on main power unit
 - ◇ Open programs
 - Turn on computer(s)
 - Open your email
 - Open video link
 - Open meeting minutes document
 - Attach door signs to door
 - ◇ "Video streaming in progress" sign
 - ◇ "Committee meeting time and place" sign
 - Set out name place cards according to seating chart
 - Set out handouts next to each occupied chair

- Set out sign-in sheet at registration table
 - Set out extra handouts at registration table
 - Make coffee and set out cream, sugar, cups etc. (need 45 minutes for coffee to brew)
 - Create slates for video streaming (see ToastMaster manual)
 - Unlock doors
 - Check batteries in microphones A and B and turn them on
 - Plug in timer and turn on
 - Turn on furnace (heat or air conditioning)
 - Para-Technical responsibilities during meeting
 - Meeting minutes
 - Ensure all attendees sign registration sheet
 - Make sure speakers identify themselves and speak from the testimony table
 - Start and stop timer during public testimony
 - Record vote and motions, clarifying if necessary
 - Make sure a copy of handouts and testimony is collected for the permanent record
 - Post meeting clean up (first two bullets, see ToastMaster manual)
 - Burn CD of meeting
 - Turn off ToastMaster equipment
 - ◇ Close programs
 - ◇ Turn off main power unit
 - ◇ Turn off power strip
 - Save meeting minutes document on computer
 - Close all programs and shut down computer(s)
 - Remove door signs
 - Pick up name place cards
 - Pick up extra handouts
 - Pick up sign-in sheet
 - Clean up coffee and supplies
 - Turn off microphones A and B
 - Turn off timer and un-plug
 - Turn off foot heater(s)
 - Turn on furnace (heat or air conditioning)
 - Turn off lights
 - Lock doors
- ☐ Give Webmaster CD on meeting to post on the web
- ☐ Para-Technical prepares and finalizes meeting minutes
- Review meeting via burned CD
 - Type draft minutes (summarize general discussion and key code sections) *(see example 21)*
 - Send draft minutes through internal review loop, using track changes to:

- Chief, Program Manager if applicable, Policy Analyst (if needed), PTS Manager, Code Para-Technical (in this order)
 - Receives comments and/or changes to minutes and accepts changes
 - Finalize minutes by removing “draft” water mark and making any final changes
 - Send to Webmaster for posting to the committee web page

- ☐ Prepare committee recommendations for next board meeting (recommendation documents are prepared during the same time the minutes are being finalized)
 - Chief or Policy Analyst reviews committee’s recommendations and writes draft board memo. Once finalized, sends directly to Boards Coordinator for inclusion in the next board packet (*see example*)
 - Para-Technical updates matrix with committee’s recommendations (approved, amended, rejected) including any additional documents and updates committee web page with those documents (Boards Coordinator will include link to committee web site in board packet).
 - Policy Analyst prepares any other code related information such as rules, tables etc., and forwards to appropriate staff for review and inclusion in the next board packet (PTS Manager, Program Manager, Chief, Rules Coordinator, Board Coordinator). Para-Technical should retain a copy for the code committee record.
 - Once public notice has been posted of upcoming board meeting in which board will review committee recommendations, Para-Technical will forward the notice to committee members (it is important that committee members receive final documents that will be reviewed by the board).

- ☐ Two-step code approval process
 - Board meeting (Para-Technical attends meeting to hear discussion on proposed recommendations). Board reviews and approves committee recommendations; if board does not approve there may be additional committee meetings needed to review pertinent code sections
 - Administrator reviews the board’s recommendations and either approves code and subsequent rule making, or disapproves and sends back to the board for changes. Administrator has the final say on code adoption.

- ☐ Rulemaking
 - Rules Coordinator files Rule hearing notice; see code timeline
 - Rulemaking hearing held with the Chief as the hearings officer
 - If the testimony at rule making hearing results in substantial changes, rule returns to the board for final approval before permanent rule is filed
 - Rules Coordinator files permanent rule
 - Rules Coordinator handles printing and distribution of code amendments in rule (these are the “rule amendments”, which are printed on salmon colored paper for inclusion in the OAR compilation)

- ☐ Para-Technical follows up on code proposals, notifying code proponents of the board’s final recommendations. Notification includes whether their proposal was adopted, adopted with amendments or rejected (*see example 22*)

❑ Finalizing and publishing the code

- Chief and technical staff compile first draft of code or code amendments
- Para Technical receives first draft from Chief and reviews for formatting
- Para-Technical works with publisher to get Oregon code published and posted online (code may be sent back and forth between BCD staff and publisher for various draft reviews) *(see example 23, list of contacts)*
- Para-Technical reviews code program Web page and updates with new code as appropriate
- Chief or Policy Analyst drafts communications piece about new code for inclusion next board packet
- Para-Technical works with the Chief or Policy Analyst to develop a short article for the Building Department Newsletter

❑ Additional updates

- Exams - Chief may update code portion of exams to reflect the new code
- Statewide Interpretations – Does the new code affect an interpretation?