INTRODUCTION

The 2011-2015 CSI Strategic Plan is the product of the CSI Strategic Planning Task Team and the CSI Board Planning Committee. This document provides the Board with key elements that communicate organizational priorities over the next three to five years. The plan is based on a solid foundation of member and market research conducted in conjunction with the project. The plan includes the following components:

- Mission
- Values Statement
- Envisioned Future
- Themes
- Objectives
- Radar Screen of Strategic Issues
- Strategy Map

The strategic plan will be augmented by the CSI Programs and Initiatives Plan, which will provide measurable target goals in each of the program areas of the Institute. The metrics in this plan will be monitored and updated annually to ensure that CSI is on target to achieving our long term goals.

CSI would like to acknowledge the members who have given graciously of their time to support, insight, and guidance to the process. CSI is extraordinarily grateful for their significant contributions to the process and plan.

Strategic Planning Task Team

- Eugene A. Valentine, FCSI, Lifetime Member, CCS, AIA, Chair
- Cynthia Belisle, CSI, CDT, AIA
- James A. Chaney, FCSI, Lifetime Member, CCS, CCCA
- Bruce Duncan, CSI
- D. Michael Fuller, CSI, CDT
- Marvin Kemp, CSI, CDT, AIA
- Thomas Rauscher, FCSI
- Joanne L. Rodriguez, CSI, CDT, LEED AP
- Leslie H. Schlesinger, CSI-I, CDT
- Alana Sunness-Griffith, FCSI, Lifetime Member, CCPR
- Scott Tobias, CSI, CDT, AHC, LEED AP
- Vivian E. Volz, RA, CSI, CCS, LEED AP
- Michael M. Davis, FCSI, CDT, CSI President 2009-2010
- Gilman K. M. Hu, FCSI, Member Emeritus, AIA, CSI President 2008-2009
- Walter T. Marlowe, CSI, PE, CSI Executive Director/CEO

Board Planning Committee

- Dennis J. Hall, FCSI, CCS, CCCA, FAIA, SCIP, Hon. CSC, Chair
- Gregory J. Markling, FCSI, CCS, CCCA, AIA, LEED AP
- Lane J. Beougher, FCSI, CCS, CCCA, AIA, LEED AP BD+C
- David Dixon, CSI, CCPR, CCCA, RRO, RRC
- Cornelius H. Davison, CSI, CCS, CCCA, AIA
- Scott Tobias, CSI, CDT, AHC, LEED AP
MISSION

MISSION is the fundamental reason for being, serving to answer the question of “why does this organization exist?” The mission statement need not be a “tagline” but must primarily resonate with key stakeholders as the primary direction setting statement for the association’s work.

The mission of CSI is to advance building information management and education of project teams to improve facility performance.

VALUES STATEMENT

VALUES represent the core priorities in the organization’s culture, including what drives members’ priorities and how they truly act in the organization.

CSI is an association dedicated to improving organization, management, and communication of building information through:

- A diversified membership base of allied professionals involved in the creation and management of the built environment
- Continuous development and transformation of standards and formats
- Education and certification of professionals to improve project delivery processes
- Creation of practice tools to assist users throughout the facility life-cycle

ENVISIONED FUTURE

ENVISIONED FUTURE\(^1\) conveys a concrete, yet unrealized vision for the organization. It consists of a Desired Future State – a clear compelling catalyst that serves as a focal point for effort – and a Vivid Description – vibrant and engaging descriptions of what it will be like to achieve the Desired Future State. From this perspective, we can say that Envisioned Future describes what success looks like.

**Desired Future State**

Facilities are constructed and operated more accurately, efficiently, safely, and at lower cost to their owners and users because of CSI members’ technical expertise and contributions to the building information and project delivery body of knowledge.

**Vivid Description**

- The construction industry recognizes CSI as the primary resource for relevant products, programs, and services for organizing, managing, and communicating building information and the project delivery process to meet the needs of an evolving industry.
- Senior leaders of construction industry firms recognize the value of participation in CSI, encourage membership in the Institute, and support involvement at all levels.
- Members of the construction industry seek active participation in CSI at all levels, as the experience is rewarding and leads to personal and professional success and enrichment.
- The construction industry recognizes CSI as a welcoming and nurturing community of professionals that care deeply about the long-term success of their fellow members.
- Hiring managers equate CSI membership with a higher level of achievement, expertise, and connection in the construction industry, and seek out its members for key positions.

\(^1\) Adapted from *Built to Last*, Jim Collins and Jerry Porras
# STRATEGIC THEMES

**THEMES** are descriptive statements representing a major component of a strategy, as articulated at the highest level in CSI’s Envisioned Future. When considered in context with an organization’s mission and vision, themes represent a conscious decision about a chosen strategic path – running through all of the organization’s work and decision-making.”

CSI’s themes include:

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<tr>
<th>THEME</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>COMMUNICATIONS EXCELLENCE</strong></td>
<td>CSI communications must differentiate its value to both its members and the construction industry as a whole. CSI will ensure that the role of chapters, regions, and the national organization are maximized in developing and delivering effective communications. This communications theme includes a focus on generating two-way dialogue with members and stakeholders as well as expansion into emerging communications tools and mediums.</td>
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<td><strong>BUILDING TEAM DIVERSITY</strong></td>
<td>Collaboration and knowledge sharing across the building team is central to CSI’s value proposition. This helps to define CSI’s brand and is a critical strategic driver of its success. For maximum impact, CSI’s strategic initiatives should leverage the diverse nature of its membership and reinforce its unique role among members of the construction industry.</td>
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<td><strong>BUILDING INFORMATION MANAGEMENT</strong></td>
<td>Due to the evolution of the construction industry, including a transcendent shift in how building information is compiled, managed, and accessed, CSI must be the go-to resource for knowledge in organizing, managing, and communicating building information in order to ensure future relevance.</td>
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OBJECTIVES

OBJECTIVES are concise statements articulating a specific component of what the strategy must achieve/what is critical to its success. Each theme usually contains 3-6 primary objectives that state a key aspect of the strategy to be achieved over the next 3-5 years. Objectives are best stated as action phrases (verb/object) and may include the means and/or desired results as well as the action.

CSI MEMBER PERSPECTIVE

Support and strengthen chapters and regions and develop synergy among all levels to harness the energy and innovation within CSI

Get back to CSI’s grassroots nature, with each and every member having the ability to be involved at all levels of the organization. By building strong chapters and engaging members at all levels, all of CSI is strengthened. A synergy among chapters, affiliates, regions, and the national organization develops. Members see how their contributions build CSI in its many facets.

Align CSI’s resources to key strategic priorities

All CSI priorities will require resources to make the priorities real. This may mean a budget for leadership training or helping chapters, affiliates, and regions improve their member communications. It may mean redeploying staff resources to better support the highest-priority work being done by volunteers.

Develop technological competencies and infrastructure to fuel effective member communications and growth

Harness and improve existing and new technologies for communication, such as blogs, social media, collaborative work environments, and video links, to give members new opportunities to contribute to group efforts or receive education. Can a committee meet via videoconference? Can a project be developed asynchronously using a single shared document? The rapid growth of construction collaboration technology raises our members’ expectations for the Institute’s communication tools; by the same token, CSI should use the best of these tools to gain the participation of more members in more places.
### CONSTRUCTION INDUSTRY PERSPECTIVE

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<tr>
<th><strong>Integrate CSI standards and formats into current project delivery practice tools to enable the transfer of building information among all members of the construction industry</strong></th>
<th>CSI has a proven history of creating standards and formats that improve project information coordination and management. CSI must advance these legacy standards and formats into emerging electronic practice tools that serve the entire construction community.</th>
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<tr>
<td><strong>Expand the industry’s understanding of the building information community and the roles and importance of its practitioners</strong></td>
<td>CSI is in a unique position to assist the industry in understanding the role of the building information managers in the integrated project delivery process, construction administration, and facility management, as building information is taking greater importance in achieving high performing facilities.</td>
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<td><strong>Strengthen educators’ understanding of CSI’s role and resources</strong></td>
<td>Future progress for CSI will require champions within academic institutions, informed by two-way learning and information sharing. Educators should recognize CSI’s unique knowledge expertise in building information management and CSI must recognize the needs of educators for knowledge content to fit into the education curriculum.</td>
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<td><strong>Expand the scope and relevance of CSI educational programs and certifications to be valuable to all industry members</strong></td>
<td>Because CSI is the leading association that includes the whole diversity of the construction industry, it is essential that we develop educational programs, certifications, and practice tools that appeal to all segments of the industry. CSI can also expand its role as a clearinghouse for programs and certifications offered by other industry associations.</td>
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<td><strong>Nurture industry alliances and synergies to maximize the visibility and impact of the building information community</strong></td>
<td>No single organization possesses all knowledge and CSI must work with other allied groups to advance the construction industry. We must assume a leadership position in our core knowledge area of building information management and work with other stakeholders to develop practice tools, which incorporate CSI formats and standards. CSI must engage building product manufacturers’ support of greater CSI participation by providing specific forums and programs where they are integrated with the greater design and construction community.</td>
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FINANCIAL PERSPECTIVE

*Improve the ability to quantify the financial impact of CSI programs and services*

CSI must utilize financial and operational procedures that capture the full revenue and expenses associated with individual CSI programs and services. This approach moves the organization further away from a provider focus (what member committees or staff departments like to produce) to a customer focus (what products and services are members actually using). This information will allow CSI leadership to properly channel resources to those products and services that are delivering real value to members.

With improved financial information programs and services that have a...
- positive financial net and high impact (high volume sales, high adoption, high industry citations, or groundbreaking) can be more easily expanded with additional resources,
- positive financial net and low impact (low usage, low citation, non-groundbreaking) can be maintained or monitored but not unnecessarily expanded,
- negative financial net and high impact can be consciously subsidized as a member service, and
- negative financial net and low impact can be more easily identified and eliminated

*Identify, develop and maximize alternative revenue streams*

CSI must be open to developing alternative revenue streams beyond traditional membership dues, publication sales, and education/registration fees. CSI intellectual content must be aggressively protected and licensed where appropriate. Existing intellectual content may be repackaged in new distribution methods to extend its use by members. Social networking and new internet media create opportunities for new product sales and sponsorships. Strategic partnerships with both non-profit and for-profit organizations must be employed. Government or foundation grants or contracts may be utilized for product and services development.

*Promote CSI channels as the essential “conduit for commerce” in the construction industry*

CSI must be recognized as a community where members’ economic goals can be advanced through a network that is essential to doing business. Industry leaders must participate and encourage use of CSI products and services in their organizations. CSI membership and certifications must be viewed as providing an economic advantage through routes such as higher compensation, enhanced employability, or increased access. Participation at CSI events such as chapter meetings or CONSTRUCT & The CSI Annual Convention must be viewed as critical to meeting annual business objectives, providing an explicit return on members’ investment.
## ORGANIZATIONAL PERSPECTIVE

**Increase responsiveness and reliability to ensure a valuable and rewarding member experience**

CSI must maintain transparent organizational structures and processes that value and foster member participation and feedback. CSI leaders must constantly seek out and respond in a timely manner to member concerns. An organization that listens to its constituents and quickly moves to address their needs will remain relevant and vibrant. Members must feel confident that the CSI leaders desire input, are listening to the members, and are acting on providing products and services that build membership value. A strong leader training and development program must support this structure.

**Create collaboration tools and resources to allow for effective knowledge sharing and productive teamwork**

CSI must utilize modern communication and collaboration tools to fully involve members in sharing their expertise with each other. Web 2.0 and social networking tools (discussion forums, online surveying, blogs, twitter, RSS feeds, etc.) must be utilized to attract thought leaders to participate and to allow members to interact directly with each other. Knowledge must be developed and shared where it exists rather than solely relying upon traditional development paths such as national committees.

**Develop and deliver programs and services to help emerging professionals**

CSI must recognize the importance of emerging professionals (those within 5 years of entering the profession) as the future of CSI and the construction industry. Emerging professionals must perceive a welcoming organization that values the unique knowledge, skills and attitudes that they bring. Programs and services must be developed for emerging professionals as a part of mainstream CSI offerings. More experienced CSI members must be willing to share their knowledge with emerging professionals (mentoring) and be open to acquiring knowledge on new approaches, processes, and technology applications from emerging professionals (reverse mentoring).
CSI RADAR SCREEN OF STRATEGIC ISSUES

The RADAR SCREEN is a one page summary of the most critical issues impacting the industry and the association. Issues give rise to a compelling reason to act in the association’s strategic plan.

INDUSTRY

1. The rapid pace of technological advances is changing how people work together, manage building information, and utilize digital systems to enhance those processes.

2. The development of a generally accepted “connection” between historical specifications (written building information) and emerging requirements for Building Information Modeling (BIM) could lead to increased relevance of CSI standards and formats, less industry confusion, and more widely accepted and effective building information management practices.

3. Fundamental shifts in the manner in which specifications are written and updated creates an opportunity for CSI to help shape the evolution of the roles and responsibilities of building information professionals.

4. Increased promotion and awareness of the value of CSI’s certifications as legitimate and valuable professional credentials could increase industry acceptance and penetration.

5. The increasing focus on facility performance creates opportunities for CSI to support our members by developing and maintaining formats, standards, and practice tools to increase their productivity and the quality of their work.

ASSOCIATION

6. A more consistent and impactful approach to chapter and region communications, training and education could clarify CSI’s strategic direction, improve member service delivery, reduce inconsistencies in CSI’s “message”, and improve the member experience at all levels.

7. Limited awareness of Institute programs and services means that perception of CSI’s value proposition does not extend past the chapter level.

8. A shared vision and more coherent brand strategy could reinforce and extend CSI’s key attributes and major contributions to the construction industry, and reduce the industry’s misinterpretations of CSI’s core purpose and identity.

9. A properly designed and user-friendly website could help fulfill member expectations, promote member interaction, and increase member satisfaction.

10. Proper hiring and deployment of staff resources to only mission-critical (brand-related) activities of the Institute could help prevent scenarios where 1) volunteers are overworked resulting in diminished member interest in continued involvement, or 2) where volunteer involvement is not properly supported (directed/mentored) by staff resulting in programs that are not fully endorsed by the membership.
CSI Mission: To advance building information management and education of project teams to improve facility performance.