

NEWSLETTER

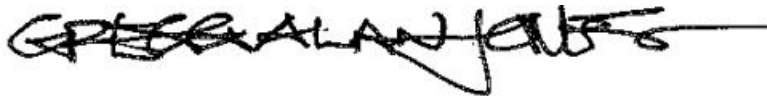
I'm back! Hi there, it's me, Gregg Jones, CSI CDT, CCS. You may remember me from a couple of years ago when I was your FY 2022 Great Lakes Regional President. The term for this role seems short, just when you get things figured out it's time to pass the baton. So, I'm looking forward to spending a second term as your regional president and the things we can do together as the CSI "GREAT" Lakes Region.

I have been a member of the Grand Rapids CSI Chapter since 2006. Professionally I am a registered architect and architectural specifier in Kalamazoo, Michigan. This year I'm celebrating my 40th year in this profession which I enjoy so much. CSI represents to me what I like so much about this profession. It is the collaboration of architects, engineers, contractors, product representatives, and building owners to imagine, create, document, and build structures for people to live, interact and work in.

As the methods we use to create drawings, specifications and buildings evolve, so does CSI and what it has to offer to the design and construction industry. CSI is dedicated to improving the communication of construction 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.
- And even more Chapter and Region leadership tools.

Here's to a great year for all of us!



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Hoping you have had some time to decompress this summer and enjoy some time with family or traveling. Take time for mental health breaks. It has been crazy busy!

CSI was founded on March 8, 1948, and has continued to influence the design and construction industry for 75 years. Congratulations to all that have made CSI a success.

CSI CEO Mark Dorsey FASAE, CAE was recognized with the top National Association Leadership Award of 2023 by the American Society of Association Executives (ASAE). This award recognizes executives who show “exceptional qualities of leadership” and “a deep commitment to voluntary membership organizations.” Please extend your congratulations to Mark.

Learn more about the CSI Foundation's Scholarships which include national conference registrations and CSI Certification exam registrations. Apply by August 16th for the 2023 CSI National Conference. Apply by August 31 for the CDT or CCPR certification.

Join in on Tech Talk Tuesdays. Go to the CSI Website to see the schedule. Also check out the CSI Learning Library for other courses offering Learning Units. There is a wealth of information and learning opportunities.

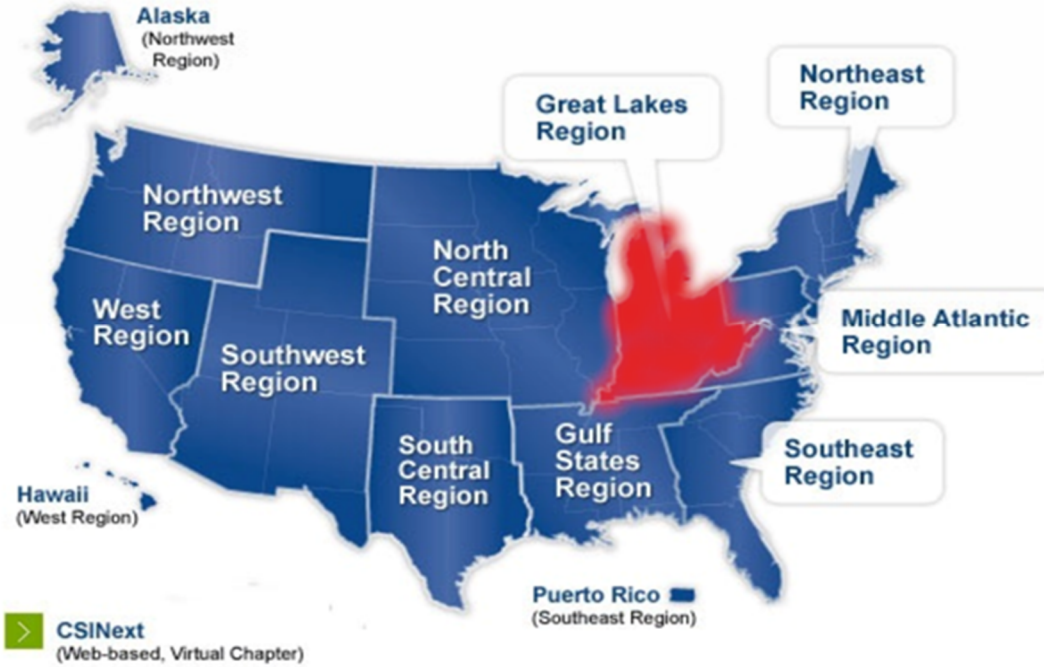
Register to the CSI National Conference on October 4-6 in Minneapolis, MN. [Home - 2023 National Conference \(csiresources.org\)](#)

I will be attending and hoping to see you there. Space is limited!

Thanks,
Ivette Bruns CSI CDT CCS
Director from the Great Lakes Region
ibruns@ratiodesign.com



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CHAPTERS

- Akron-Canton**
- Cincinnati**
- Cleveland**
- CSI Next**
- Evansville**
- Grand Rapids**
- Indianapolis**
- Lansing**
- Louisville**
- Metro Detroit**

Our Mission

To advance building information management and education of project teams to improve facility performance.

[Home - Great Lakes Region \(csiresources.org\)](http://csiresources.org)

(August 2023, *The GLR Newsletter* Electronic) * PDPG – Third Edition

ANSWERS: 1. - d [PDPG, 7.3.1*]; 2. - b [PDPG 5.1.1*]; 3. - a [PDPG 1.8.2*]; 4. - b [PDPG 5.1.1*]; 5. - c [PDPG 5.1.2*]

CERTIFICATION QUIZ ANSWERS

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Here are **some of the things your Region and Region Officers do** better as part of the Construction Specifications Institution Structure:

Leadership Training If you've ever thought about applying for a Chapter Leadership position, it's as simple as looking [here](#) to see what kind of thing are expected.

Programs Bureau- Programs Chairs have a place to go to fill up a hole or two in the annual calendar. If you see a monthly program that stands out, please pass those thoughts on to Jack Morgan, who oversees the submissions. Visit the Speakers Bureau [here](#).

Awards- The format and organization of our Awards program is very robust and well thought out. It's been seen by other regions and used as a template for the creation of their awards programs. Please review it [here](#) to see how to reward active leaders in your chapter. Gregg Jones (Grand Rapids) and Jack Morgan (Indianapolis) are the current Awards Committee Co-Chairs.

Chapter Challenge- Introduced in 2018. It's a way to introduce your friends and colleagues to CSI. More on this on page 3 of this newsletter.

Member Relief Program- Introduced December 2020, still in effect. [Details](#) and information [here](#).

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The CHAPTER CHALLENGE, which began in 2018, is still in full effect.

The purpose of this CHALLENGE is to increase membership. In this CHAPTER CHALLENGE, the Chapter members must recruit new members with no cost to the new member. The Chapter will pay for the first year's chapter dues, and the Region will pay for the first year's Institute dues. This is for PROFESSIONAL and EMERGING PROFESSIONAL members only (renewals and industry members are not included).

Your involvement does not stop there! Once the new members attend their first Chapter meeting, the Chapter has to engage those new members, embrace them by making them a part of the Chapter, getting them involved, and giving them a sense of belonging.

Who can you recommend today?

If you have any questions or need any other information, please contact one of the following:

Great Lakes Region Chapter Challenge Advisor

Ken Schmidt – Operations Manager Seward Associates

317-979-1700

kschmidt@sewardassociates.net

Great Lakes Region Membership Chair

Blair Reese 313-269-3868

breese@ghafari.com

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- Dynamic Chapter Program (DCP), August 22, 2023, at 2:00 pm (EDT).
- GLR, Go-to-Meeting, Wednesday, August 23, 2023, 4-5pm
- 2023 CSI National Conference, October 4-6, 2023, in Minneapolis, MN. There
- will be a GLR Caucus at this event.
- 2024 Spring, Region Conference, April 18-20, 2024 Indianapolis.
- Region Conference Master Planning Schedule is being revisited for updates.
- Kicking around the Idea for a Bi-Region Conference. Stay tuned.
- CSI recently published Administrative Guide – Chapter Directors please look for this.
- Annual Check-In due Sept 30, 2023. The CSI Website has sample survey,
- includes review of Affiliation Agreement, Bylaws, legal status, and required document uploads.
- Let us know if there is something you want to share about your Chapter.
- Officer and Committee Training available.
- The Region needs YOU for the following OPEN POSITIONS:
 - President Elect – Interested?
 - Vice President 1– Interested?
 - Vice President 2 – Interested?
 - Treasurer – Interested?
 - Secretary-Interested?
- New Fiscal Year Begins July 1.
- Annual Check-In Report Due September 30.
- IRS Form 990 Due - most chapters and regions November 15.
- Begin Recruiting Officer and Leaders for Next Fiscal Year January 15.
- Officer and Leader Roster Report Due *Must be submitted even if roster remains same 31-May.
- End of Fiscal/Chapter Year 30-Jun.

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**Jack P. Morgan, FCSI, CCS, CCCA, CDT, AIA, LEED Green Associate, NCARB, SCIP
Great Lakes Region CSI Quizmaster**

:

1. The Parties to the Construction Agreement are?
 - a. General Contractor, Sub Contractor, and Construction Manager
 - b. A/E, General Contractor, and Contract Administrator.
 - c. Building Official and General Contractor.
 - d. Owner, Contractor, and A/E.

2. The requirements of the General Conditions can be modified or expanded to accommodate specific project conditions, owner's requirements, or unusual aspects relating to the roles, rights, duties, and responsibilities of the parties to the contract for construction, in this document:
 - a. Contract Modifications.
 - b. Supplementary Conditions.
 - c. Addendum.
 - d. Consensus Documents.

3. Defined as the written and graphic documents prepared or assembled by the A/E for communicating the project design for construction and administering the construction contract.
 - a. Construction Documents.
 - b. Plans.
 - c. Procurement Documents.
 - d. Conditions of the Contract.

4. The documents developed to attract and assist qualified bidders in properly submitting bids are called?
 - a. Contract Documents.
 - b. Procurement Requirements.
 - c. Conditions of the Contract.
 - d. Bidders Agreement.

5. Contract documents include:
 - a. Written portions of the contract only.
 - b. Graphic portions of the contract only.
 - c. Both written and graphic portions of the contract.
 - d. Invitation to bid.

Answers on Page 3

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Yearly Reporting Requirements

To ensure continuity in operations, including timely dues payments to chapters, and to acknowledge compliance with the affiliation agreement, every component is asked to complete two reports per year:

May 31 Report

Submit: Officer and leader roster for upcoming fiscal year

September 30 Report

Attest that:

- The component is in good standing to conduct business (current with state and
- current with IRS)
- Directors and officers' insurance is in place
- General liability insurance is in place
- Banking information is current
-

Identify:

Any enabling document that changed in previous fiscal year-

- Submit updated copies if have not already
- If bylaws were updated, must also confirm reviewed by independent legal counsel experienced with non-profit, tax-exempt organizations prior to adoption.

Submit:

- Financial documents from the previous year, including state of activities, balance sheet, and cash flow.
- Potential recruitment and customer lists
-

These reports will be available at least two months ahead of their due date and will be accessible through the Chapter and Region Leader Community.

In the case that a component is not able to meet one of these obligations, the component and CSI national will work together to create a plan to become compliant.

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Akron-Canton	Bryan Ziga	bryan.ziga@primeeng.com	Website
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CSI Next	Mark Ogg	mark.ogg@jll.com	Website
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PARTNER with US to engage the Design, Architect, Engineer, Owner and Contractors by recognition to manufacturers, your products and services advertised here.

Contact: Jack Morgan morwalsoplad1@gmail.com



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The Best Architectural Podcasts of 2023

https://www.arcat.com/podcast/best_architectural_podcasts

Building product manufacturers and associations that provide continuing education

<https://www.arcat.com/ces>

Green Building Resource

<https://newbuildings.org/>

The Office of Energy Efficiency and Renewable Energy (EERE)

<https://www.energy.gov/eere/office-energy-efficiency-renewable-energy>

Construction Document Production

<https://www.archtoolbox.com/design-document/construction-documentation/>

Does Your Website Meet the Specifier's Needs?

https://www.4specs.com/s2a/news/2022.01_sections.html

Specifier Resource

<https://www.4specs.com/>