

## NEWSLETTER

Hello,

Do you have any of the CSI Certifications?

This is a program that benefits anyone in the AECO industry (and PRs too). As an architect and spec writer, I have found my CDT and CCS very valuable. And with working with Owners, Contractors, and Product Reps, I can see the value to them too in understanding how all parties of the project delivery team can work together.

With a quick glance at our Region's membership roster, I found we have the following certifications amongst our members:

- **350 CDT** certifications out of 665 region members
- **38 CCCA** advanced certifications
- **17 CCPR** advanced certifications
- **66 CCS** advanced certifications

These numbers seem low to me, especially the advanced certifications. How can we improve these numbers?

- Architects/engineers/spec writers – ask reps if they are members of CSI or have their certifications.
- Reps – you can do the same when making sales calls.
- Contractors – in my own chapter we have had several companies encouraging their project managers and superintendents to get certified.
- Chapters – offer study sessions in your area, encourage attendees to join CSI to receive discounts on materials and exams.

Earning a **Construction Documents Technologist (CDT)** certification proves you have a comprehensive understanding of project delivery systems and how to effectively interpret and communicate construction documentation.

Earn your **Certified Construction Contract Administrator (CCCA)** certification to demonstrate your knowledge of developing, administering, and enforcing construction documentation.

Attaining the **Certified Construction Specifier (CCS)** certification validates that you're a skilled product researcher who knows how to identify cost-effective, efficient solutions – and communicate those through specifications.

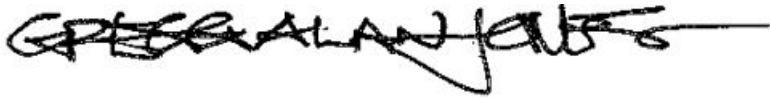
A **Certified Construction Product Representative (CCPR)** is more than a sales rep – you're a valued resource called upon by design teams because you understand construction documentation and speak their language.

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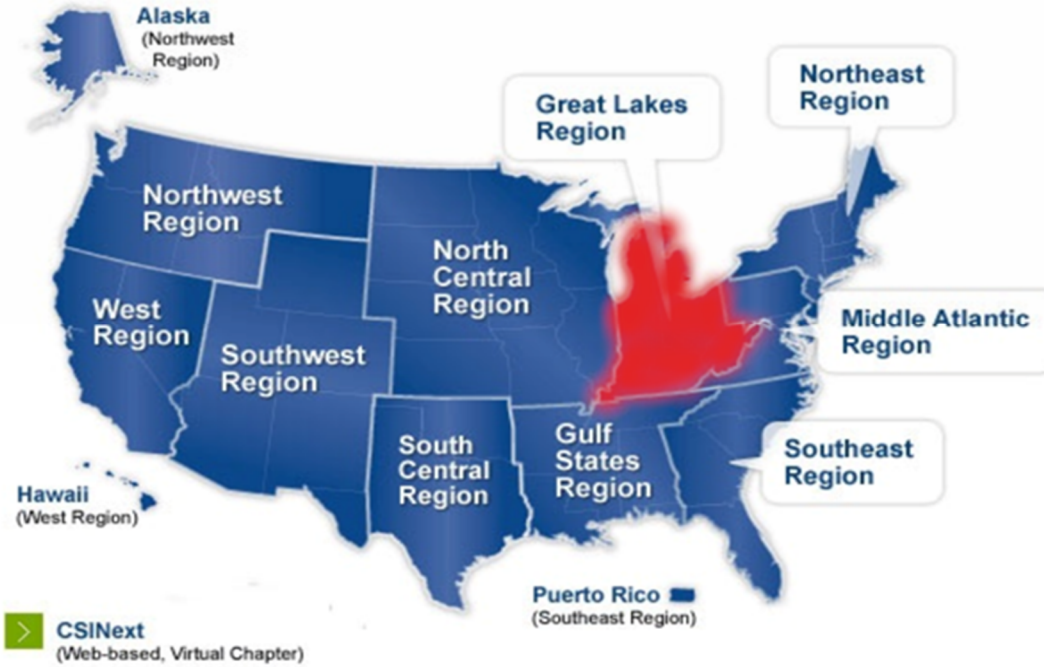
For more information about the certification program, study materials and exams you can go to

<https://www.csiresources.org/certification/overview>.

Gregg Jones, AIA CSI CDT CCS



**NEWSLETTER**



**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)

1. - a [PDPG, 3.1.4.2\*]; 2. - b [PDPG 8.12.9\*]; 3. - c [PDPG 4.2.3.3\*]; 4. - a [PDPG 5.8.2.1\*]; 5. - a [PDPG 5.3.3.2\*]

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

ANSWERS:

**CERTIFICATION QUIZ ANSWERS**

## NEWSLETTER

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](#).

## **NEWSLETTER**

**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](mailto:kschmidt@sewardassociates.net)

### **Great Lakes Region Membership Chair**

Blair Reese 313-269-3868

[breese@ghafari.com](mailto:breese@ghafari.com)

## NEWSLETTER

- 2023 CSI National Conference, October 4-6, 2023, in Minneapolis, MN. There will be a GLR Caucus at this event. Be sure to let us know who attended from your chapter for Region sponsorship considerations.
- 2024 Spring, Region Conference, Indianapolis. TBD.
- Region Conference Master Planning Schedule is being revisited for updates.
- Kicking around the Idea for a Bi-Region Conference. Stay tuned.
- Annual Chapter 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, 2024.
- 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 2024.
- End of Fiscal/Chapter Year 30-June 2024.
- CSI Master Specifiers Retreat (MSR) will be held on February 7-9, 2024 at Royal Sonesta in San Juan, Puerto Rico. Participants get access to one-on-one meetings with senior building product manufacturers, information on key developments impacting the construction industry, key intelligence and data from subject matter experts, free accommodations and travel reimbursement, and earning up to 3.0 CSI Learning Units. Space is limited. Apply now.
- Share your Certification Exam experience that you would like to share [here](#)
- Share your CSI 2023 National Conference experience for Newsletter [here](#)
- Share your Spec-related photos with message for the Newsletter [here](#)

## NEWSLETTER

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

1. Under the Design-Build project delivery method, there are several benefits to the Owner that include all of the following except for one:
  - a. The A/E represents the owner's interests.
  - b. The A/E and Contractor comprise the Design-Build entity.
  - c. The Design-Builder has specialized knowledge of design and constructability.
  - d. Single entity is responsible.
  
2. The specified correction period (typically one year) and specified extended warranties begin:
  - a. Upon final payment.
  - b. On the date of substantial completion.
  - c. One year from occupancy of the project.
  
3. A defined portion of work that is priced separately is:
  - a. A Unit Cost.
  - b. Lump Sum.
  - c. Alternate.
  
4. A particular material may be indicated several times on the drawings but is specified in how many locations:
  - a. One.
  - b. Two.
  - c. According to the number of trades involved.
  - d. As determined by Division 01.
  
5. In specification writing, the two basic grammatical sentence moods which can be used to clearly convey specification requirements are:
  - a. Imperative and Indictive.
  - b. Suggestive and Imperative.
  - c. Prescriptive and Descriptive.
  - d. Performance and Indictive.

Answers on Page 3

## NEWSLETTER

### 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.



## NEWSLETTER

### **Educational Opportunity (reprint)**

Summertime is bliss for the young. School calendars stop. All too quickly the dog days of summer bring reality back into their lives. Students prepare to say goodbye to days off and begin to focus on learning new things. Many CSI Great Lakes chapters take some time away from their regular monthly programs. July and August are for refueling, planning meetings and meeting preparation. Membership programs look for new ways to bring in fresh faces and potential new members.

September is a good time to visit your local community college and/or university's architectural or construction management program. It's common knowledge that most architectural programs are focused on the visual part of design, not the technical part of the project. Construction management programs vary widely but are often focused on the physical part of construction. The pieces and parts that make up each building: Cement, Steel, Mechanicals.

It's important to remember that each of these programs has a requirement to include some kind of documents instruction.

This is an appropriate place to introduce CSI into the program. Pitch the Project Delivery Practice Guide as a teaching tool for the document's requirements for the program. A simple 3-hour course with the CDT test student rate built in as a lab fee could also mean an interested student could graduate with some industry credentials to place on their resume.

The key is a CSI educated instructor. Teachers are natural mentors, authorities. Hearing about CSI and the CDT from them makes a huge impact on the student body. It can mean possible new members at the chapter level or at the very least future trade show or monthly meeting attendees.

**Thad Goodman**, FCSI, CDT, CCPR, LEED Green Associate  
Academic Program Committee

## NEWSLETTER

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What are your thoughts on how A.I.  
can help your project content?

How does your firm keep up with lessons learn for the  
next project content for drawings and specs?

How do we find the next generation  
of Spec Writers?

What do you want to see from Product Reps that  
can help you with your projects?

Send YOUR comments [here](#)

## NEWSLETTER



## Sponsors



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**Seward and Associates**

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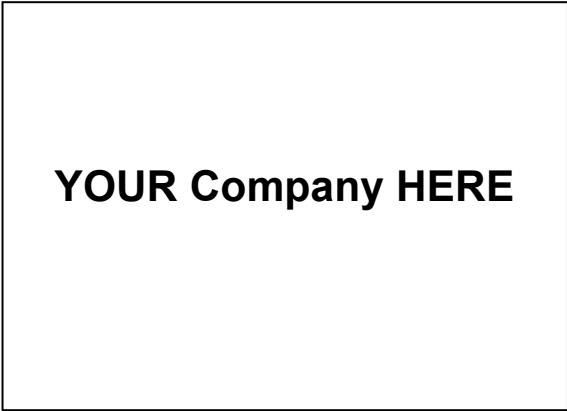
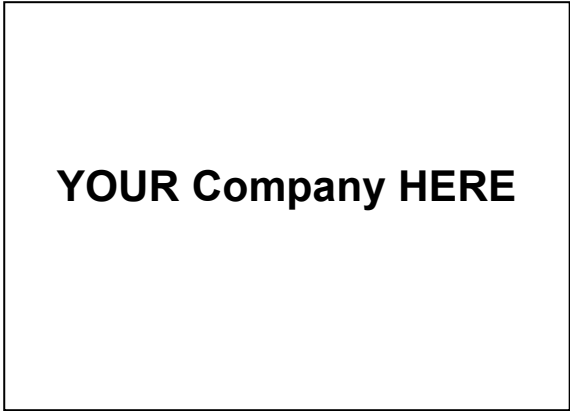
<https://www.sewardassociatesllc.com/index.html>



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## NEWSLETTER

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## **NEWSLETTER**

AI tools for Architects and Designers

<https://architizer.com/blog/practice/tools/top-ai-tools-for-architects-and-designers/>

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

Specifier Forum Resource

<http://discus.4specs.com/cgi-bin/discus/discus.cgi>