

NEWSLETTER

CSI Great Lakes Region President's Monthly Message – January 2024

Happy New Year!

I've just come from my CSI Chapter's monthly meeting, and I am reminded of the impact that CSI has on me and others.

During our happy hour I had an opportunity to catch up with many old friends, but also noticed and met many new faces to our Chapter. We have one member who is inviting and bringing emerging professionals from his office to share in the networking opportunities and education of our group. It is exciting to see growth and the variety of industries represented (A/Es, product reps, facility managers, young and old, male and female) at our meetings and in our chapter.

During dinner, we talked at our table about the upcoming storm, kids and grandkids, but I also met a new rep and now a new resource for my own product knowledge. We also discussed our program for the evening which was a "PechaKucha" 20x20 presentation format. This brought up a conversation about product rep presentations. My new rep acquaintance is just starting to give presentations, so we talked about how they can engage their audience, how to make a package AIA presentation not boring, giving out "Smarties" candies for good questions, watching others give the same presentation to see what they should highlight, and becoming more familiar with the presentation after giving it several times so you can give it, not read it.

One of the 20x20 presentations was about highlights of the Project Delivery Practice Guide. After which we talked about our Chapter's CDT classes. This sparked the interest of a product rep who thought this understanding of project delivery would be valuable to them, to which I was also able to tell them about the CDT and CCPR certifications. The other presentations for the night also introduced me to several new products and new uses for some old products I specify.

During our announcements, we talked about upcoming Chapter events, CDT classes, Chapter website, golf outing, and put out a call for new board members. With this last announcement I was able to put in a plug for the 2024 Great Lakes Region Conference in Indianapolis and after the meeting I had a rep tell me they were interested in being a sponsor for the conference.

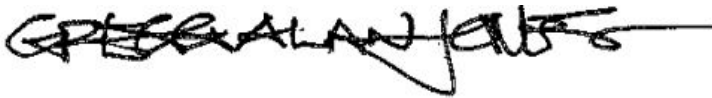
During happy hour and after our program, I had the opportunity to setup lunch'n learns for my office, discuss some projects and products, and talk about professional development and training of staff.

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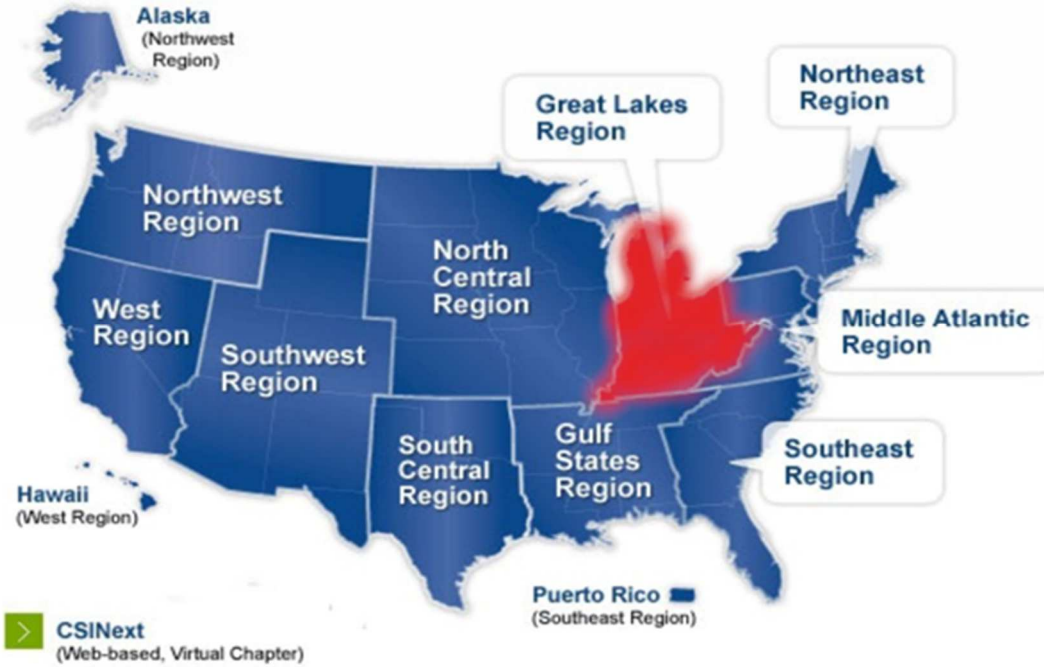
I have an hour drive home after our meetings and this always gives me time to reflect on the evening. Membership growth, interesting programs, networking opportunities, old friends, new contacts, sharing knowledge with each other, and a great meal too! These are the things that have kept me in CSI for the last 16 years, plus the opportunities I have had participating on our Chapter board, working at the region level, and attending national events.

Be a member and be involved!

Gregg Jones, AIA CSI CDT CCS



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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)

* PDPG – Third Edition

1 - e [PDPG, 3.1.2*]; 2 - d [PDPG 3.2.1.2*]; 3 - b [PDPG 8.9.2*]; 4 - a [PDPG 1.2.1*]; 5 - b [PDPG 4.3.2*] (January 2022, *The GLR Newsletter* Electronic)

ANSWERS:

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

Form(s) attached

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- **Spring Region Conference, April 11-13, 2024, Indianapolis, IN.** Details to follow.
- Region Conference Master Planning Schedule is being revisited for updates.
- Kicking around the Idea for a Bi-Region Conference. Stay tuned.
- 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?
- End of Fiscal/Chapter Year 30-June 2024.
- 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.
- 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.
- Share your Certification Exam experience that you would like to share [here](#)
- Share your CSI 2024 National Conference experience for Newsletter [here](#)
- Share your Spec-related photos with message for the Newsletter [here](#)
- Outstanding Chapter Commendation nomination due, July 2024.

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Great Lakes Region CSI Quizmaster - January 2024

Jack P. Morgan, FCSI, CCS, CCCA, CDT, AIA, LEED Green Associate, NCARB, SCIP

1. What project delivery method provides the Owner the least risk related to cost, extent, and time?
 - a. Construction Manager as Constructor (at Risk).
 - b. Integrated Project Delivery.
 - c. Negotiated Contract.
 - d. Owner Build.
 - e. Design, Bid, Build.
 - f. Construction Manager as Agent.

2. What is the final step for Construction Documents?
 - a. Architect's Quality Control review.
 - b. Constructability review by either Architect or CM.
 - c. Approval by the AHJ and other permitting authorities.
 - d. Owner approval.
 - e. Owner and CM's Quality Assurance review.

3. True/False. Contract Documents and corresponding contract requirements are modified by RFI's and their responses.
 - a. True
 - b. False

4. What is the most accurate statement?
 - a. Participant – Organizations or individuals active in only a portion of the Project delivery process with indirect interests in the Project which are not affected by the constructed facility.
 - b. Participant – Organizations or individuals active in only a portion of the Projects delivery process with interests in the Project which are affected by the constructed facility.
 - c. Stakeholder – Organizations or individuals actively involved in a portion of the Project delivery process, with no interests in the Project and not affected by the Project.
 - d. Stakeholder – Organizations or individuals actively involved in a major portion of Project Delivery process, with interest in the Project and not affected by the facility.
 - e. Stakeholder and the Participants are both involved in portions of the Project Delivery Process, with or without interest in the Project. Participants do not work for the Owner.

5. Products can be categorized into the following types:
 - a. Standard products, custom products, natural products, manufactured products.
 - b. Materials, commodities, products, assemblies, equipment.
 - c. Materials, standard products, custom products, assemblies, equipment.
 - d. Standard products, custom products, commodities, equipment.

Answers on Page 3

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CSI Great Lakes Region – January 2024

Happy New Year!

Hoping your year is off to a great start. Let updating your information and getting involved in CSI Communities on the CSI website be one of your New Year's Resolutions.

The Spring Cycle for Certifications has begun. Information can be found on the CSI website. If your Chapter is providing CSI Certification study classes, please let me know and we will put in the next CSI Great Lakes Region Newsletter.

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.

The CSI Board Meeting will be held the weekend immediately following the Master Specifier's Retreat. Please let me know if you have anything you wish me to bring to the Board's attention.

Looking forward to the GLR Conference in April 2024 in Indianapolis, IN. The venue is one of my favorites in Indianapolis – the Bottleworks. It is a renovated Coca Cola Bottling Plant. We will have a guest speaker during the conference talking about the restoration of this historic area.

Next year's CSI Conference will be held in Houston, Texas. Be looking for more information to come. Watch your email for Webreach Wednesday presentations. Earn Learning Units. Also, 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.

There are many resources available to chapters and regions on the chapter and region community at [CSiresources.org](https://www.csiresources.org). I want to direct you especially to Membership Recruitment: at <https://www.csiresources.org/chapterregionleaders/member-management/membership-recruitment>

This site includes:

- o Customizable membership flyer
- o Customizable membership PPT template
- o Social media buzz kit (for getting a social media presence started)
- o CSI event form: <https://www.surveymonkey.com/r/CSIEventForm>
- o Promotes your events on the national CSI calendar

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Thank you,

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



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Initiate. Educate. Participate.

The last two month's the Academic Program focus has discussed ways to introduce CSI to an educational institution. Thanks to those who've reached out with comments and questions, requesting a more detailed action plan for CSI chapter leaders. Contacting a professor is a good first step. Participating on the Industry Advisory Board is a proven path. A common goal is getting a University or a Community College to gain interest in CSI is by teaching the CDT prep class to fulfill their *documents requirements* in the program curriculum. Here's a quick step by step road map that starts with basic goal setting and outreach, ends with solid participation in program curriculum.

Initiate-

- Data Base update- who and where are the chapter's opportunities.
- Identify a target school the chapter would like to help grow CSI involvement.
- Establish an Introductory Letter to the program chair or tenured professor to explain chapter goals and how CSI can help the school prepare students for the workplace.
- Personal Contact- identify faculty members. Ask for a meeting to link your local chapter person with the learning institution. *It takes the personal touch to gain and gauge interest to establish a partnership.*

Educate-

- *Personal Contact*- meet with an interested faculty member- answer questions, pitch an Industry/Institutional partnership, provide an introductory packet that includes a combination of CSI Chapter, Regional, and National Website tools.
- Introductory Packet-(example)
 - Letter to interested faculty member- personalized Thank You for their time.
 - Offer free or reduced CSI membership (with chapter board approval)
 - *Chapter Challenge is a great tool for this.*
 - Chapter Newsletter, Region Newsletter, grab an Institute article or testimonial on the value of earning a CDT certification.

Participate-

- Offer to be a class speaker to share industry trends or a local project case study.
- Offer to become an Industry Advisory Board Member.
- Educate an interested faculty member with all information they will need to implement program teaching CDT prep as a Documents type part of their program.
 - Consider donating a Project Delivery Practice Guide from the chapter.
 - Provide links to the [CDT Handbook](#), [Preparation Materials](#) for review.
 - Offer to establish class speakers to help teach the program.
 - Follow up, follow up, follow up- the wheels of education turn slowly. Adding a class to any curriculum is a long uphill battle.
- Add them to Communication Newsletter/Blog to continue to keep CSI in front of the students and staff.
- No success? Consider offering a class at or near the institution for students who want to excel and leave college with an Industry Certification.

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

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What 3 things are you looking to accomplish
for your career in 2024?

[Share for the newsletter](#)

How are you using AI at work and at home?

[Share for the newsletter](#)

What are your plans for the Spring?

[Share for the newsletter](#)

What 3 suggestions can you give to help
better our profession?

[Share for the newsletter](#)

Newsletter Express YOURself comments [here](#)

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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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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

Specifier Forum Resource

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

2024 Engineering and Construction Industry Outlook

[Learn more](#)



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CONGRATULATIONS

- Spring **CCS** Exam - Pass -**Anne-Lee Vandebussche** -Metropolitan Detroit
- Spring **CCS** Exam – Pass – **Margaret (Molly) Morgan** – Metropolitan Detroit
- Spring **CDT** Exam – Pass - **Steve DeMange** - Cincinnati
- Spring **CDT** Exam – Pass - **William Hofmann** – Cincinnati
- Spring **CDT** Exam – Pass - **Hannah Holtzapple** – Cincinnati
- Spring **CCCA** Exam – Pass - **Robyn Papaioannou** - Lansing
- Spring **CDT** Exam – Pass - **Stephen Pierson** - Cleveland
- Spring **CDT** Exam – Pass - **Robert Sutton** - Akron-Canton
- **Jack Morgan** who received the **2023 Robert P. Brosseau Award** for the Advancement of CSI.

Region Conference 2024

4 months-ish and counting

April 11-13, 2024

Some-things to start thinking about:

Plans to attend

Plans to have Chapter representation

Sponsorships

Table tops

Volunteering

Leadership Training

Presenting a Topic

Certification

Getting others to know about CSI