CSI DRIVES INNOVATION BY CONNECTING DESIGN TO CONSTRUCTION

Members of the Construction Specifications Institute (CSI) take a core concept—translating design into written description of processes and products—so the project can be delivered on time and on budget.

The organization and its members are laser-focused on managing and delivering project information from conception through occupancy and facility management. CSI exists to make you a better professional in service of these goals.

"There's no other group anywhere in the country or in the industry that supports this kind of structured understanding about how you deliver a project."

KEVIN O'BEIRNE, PE, FCSI, CCS®, CCCA®, CDT*  
National Manager of Engineering Specifications, HD
The rapidly evolving world of building information management, design, construction, and facility management makes the mission of CSI more important to our industry than ever before.

The places in which we live, work, and learn shelter us, inspire us, and help us thrive. As stewards of the built environment, we influence every aspect of modern life. Whether it is the hallways of higher education, re-envisioned communities where we live and work, or the bridges and roads that connect our communities, CSI is central to the industry we love.

CSI resources and education are invaluable aids to those who design, specify, build, and manage a built environment that meets society’s changing needs, while contributing to individual wellness, productivity, and economic growth. That is why CSI has been hard at work to build a robust, diverse, and inclusive community of belonging, create a center for innovation, and elevate your profession.

By accomplishing all three, we will bring out the best in our colleagues and the built environment. That is what CSI has always sought to do and will continue to work towards in our shared future.

We are excited to be on this journey with you and to achieve remarkable things together.

Marvin Kemp, AIA, FCSI, CDT®
CSI BOARD CHAIR
Leading Through the Challenge

CSI has had an extraordinary year. The three main pillars of CSI’s focus — building a community of belonging, elevating the AECO profession, and creating a center for innovation — are the bedrock for current and planned initiatives.

Amid the pandemic, CSI maintained its focus on service to the industry and providing excellent member value. Following the board’s direction and leadership, we began the alignment of CSI’s chapter and region structure to better serve members, upgraded our certification programs and testing processes, and delivered more education and learning resources in one year than any other year in the history of the organization.

CSI’s online communities and innovative products like Crosswalk® keep CSI at the forefront of innovation and deepen relationships with companies and associations serving the built environment.

You, and your CSI, are the heart of construction, and it is a privilege to serve you and your profession.

Mark Dorsey, FASAE, CAE
CSI CHIEF EXECUTIVE OFFICER
BUILDING
A COMMUNITY OF BELONGING
The heartbeat of CSI is its membership — some 6,500 professionals representing all facets of the architecture, engineering, construction, and owner (AECO) industry. This network of design, engineering, construction, manufacturing, ownership, and facilities management professionals help each other solve work-related problems every day. Whether it is through on-line communities, chapter meetings, or at national events, CSI members are a close and welcoming community you can rely on.

As a long-time member, I regard CSI as a special organization that has provided me with a lifetime of opportunities, relationships, and real-world experiences.

PAUL DOHERTY, CSI, CDT®, IFMA FELLOW, DFC SENIOR FELLOW

If I don't know the answers myself, I know someone at CSI who does. It’s a very well-developed community.

ERICA BITTERMAN-RYON, CSI
CSI realizes that the built environment impacts many different people, from those who envision projects to those who help realize them. Building our membership to be as diverse as those it serves will play a key role in the long-term growth of the AECO workforce. Drawing expertise, insight, and knowledge from a wide range of minds is not just the right thing to do but the smart thing to do.

To help ensure that we continue to create a diverse and inclusive workforce, sustain a welcoming member community, and serve the needs of all in our built environments, the CSI Board is proud to share its Diversity, Equity, and Inclusion (DEI) statement. We at CSI:

• Seek out and value every individual difference and contribution
• Promote dignity and respect for all
• Continually increase our cultural competency and cultural humility
• Facilitate courageous conversations around diversity, equity, and inclusion in the construction industry and beyond
• Remain inclusive by design

**CSI MEMBERS BY ORGANIZATION TYPE**

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firms</td>
<td>44%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>31%</td>
</tr>
<tr>
<td>Academic Association</td>
<td>10%</td>
</tr>
<tr>
<td>Contracting, Development, and Management</td>
<td>3%</td>
</tr>
<tr>
<td>Government</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

**CSI MEMBERS BY OCCUPATION**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architecture, Design</td>
<td>28%</td>
</tr>
<tr>
<td>Building Product Manufacturers</td>
<td>25%</td>
</tr>
<tr>
<td>Construction, Contracting</td>
<td>15%</td>
</tr>
<tr>
<td>Specifications</td>
<td>12%</td>
</tr>
<tr>
<td>Engineering</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>
Engaging Community

CSI is your passport to a network of local, national, and international professionals, communities, and resources. Your membership connects you to over 20,000 professionals through our 50+ online communities and social networks, such as Twitter and LinkedIn. These networking tools provide a robust environment in which CSI members can connect, engage, share information, and trade best practices in real time while building professional relationships that can last a lifetime.

COMMUNITY BY THE NUMBERS

- **Facebook Community**: 6,000+
- **Twitter Followers**: 8,000+
- **LinkedIn Members**: 18,000+
- **“CSI Weekly” Newsletter Readership**: 32,000+
- **Specifier Circulation**: 28,000+
- **CSI-Connect Members**: 6,500+
CSI Chapters & Regions

VIRTUAL CHAPTER:
CSINext
CSI Chapters & Regions

WEST REGION
East Bay-Oakland
Fresno
Honolulu
Inland Empire
Los Angeles
Monterey Bay
Orange County
Redwood Empire
Reno
Sacramento
San Diego
San Francisco
Santa Clara Valley

SOUTHWEST REGION
Albuquerque
Denver
Las Vegas
Phoenix
Pikes Peak
Salt Lake City
Tucson

GULF STATES REGION
Acadiana
Baton Rouge
Birmingham
Chattanooga
Gulf Coast
Huntsville
Knoxville
Little Rock
Memphis
Mississippi
Mobile Bay
Montgomery
Nashville
New Orleans
Pensacola
Shreveport

SOUTHWEST REGION
Amarillo
Austin
Dallas
Fort Worth
Houston
Lubbock
Oklahoma City
Oklahoma State
University Student
San Antonio
Tulsa

GREAT LAKES REGION
Akron-Canton
Blue Grass
Cincinnati
Cleveland
Columbus
Dayton-Miami Valley
Evansville
Grand Rapids
Indianapolis
Lansing
Louisville
Metropolitan Detroit
Toledo

NORTH CENTRAL REGION
Central Illinois
Central Iowa
Central Missouri
Chicago
Crandon
Flint Hills

NORTHEAST REGION
Boston
Buffalo-Western
New York
Eastern New York
Hartford
Housatonic
Long Island
Maine
Metropolitan New York
New Hampshire
New Jersey
Rhode Island
Rochester New York
Syracuse
Vermont
Worcester County

NORTHWEST REGION
Capital
Cook Inlet
Idaho
Mt. Rainier
Portland Oregon
Puget Sound
Spokane
Willamette Valley

BUILDING A COMMUNITY OF BELONGING
CSI ANNUAL REPORT 2020-2021
CSI is known for organizing construction information and facilitating communication for all members of the project team. Thanks to the hard work of expert volunteers, CSI supports innovation across the industry through widely adopted standards and tools.

**MasterFormat®**

The architecture, engineering, construction, and owner (AECO) industry’s gold standard for organizing and communicating specifications and work results for construction projects.

**UniFormat®**

A classification system for building elements, systems, and assemblies, providing a framework for design and management across a building’s life cycle.

**OmniClass®**

A comprehensive classification system for the construction industry, encompassing key elements of both MasterFormat® and UniFormat® for a building’s life cycle and project management.

**Crosswalk®**

Launched in May 2020, Crosswalk® enhances design, construction, and facilities management software by integrating CSI standards through an application programming interface (API). Crosswalk® is the first major construction standard to be made available in this way, providing the basis for further innovation by CSI and our partners. By providing immediate, digital access to critical standards like MasterFormat®, Crosswalk® ensures accuracy and a greater standard of care for modern software users.

Learn more at csiresources.org/standards/overview

CSI is a support network. CSI is a set of resources. CSI is a set of contacts. It’s a community of like-minded individuals trying to reach the same goal — to get it right. Be that design, be it construction, be it manufacturing, we’re trying to do it better.

KATHRYN MAREK, CSI®, CCCA®, CDT®
ELEVATING THE PROFESSION
Learning
Professional development when and where you need it.

Webinars
Every two weeks webinars feature the latest product innovations and trends.

Master Specifiers Retreat (MSR)
MSR is an exclusive event that brings together architects, specifiers, and product selection influencers for an intimate experience focused on education, growing your network, and expanding your professional knowledge.

Practice Guides
Practice guides are reference materials that define the scope of practice and competencies required to perform job roles related to project delivery, construction specifications, construction contract administration, and product representation. They also serve as the primary source material for CSI’s certification exams.

Practice Communities
Practice communities are free and open forums that bring together professionals from across the globe to discuss current and emerging best practices and improve project delivery.

CSI Learning Library
An online resource with over 60 on-demand courses offering Learning Units in topics such as Building Information Modeling (BIM), sustainability, project delivery, and specifications.

The Construction Specifier
A peer-reviewed U.S. publication, The Construction Specifier provides the latest information on construction documentation, materials, and methods.

Learn more at csiresources.org/learning/overview

60+
Courses on a variety of topics, such as BIM, sustainability, project delivery, and specifications

5,800+
CSI Learning Units Earned (up 20% YoY)

21
Sponsored webinars reaching over 2,200 live attendees
The CDT certification isn’t biased towards one group of professionals. The CDT zooms out and acknowledges all the players. The architects, contractors, subcontractors, engineers, owners, suppliers, product reps, and anyone who contributes to the success of the project. The CDT breaks down roles, relationships, and responsibilities in a very beautiful way, to help each group work together more effectively, which will always result in a better project!

MICHAEL RISCICA, RA, CSI, CDT®
FOUNDER AND CEO, YOUNG ARCHITECT
Overview

CSI, the CSI Foundation, and the Construction Information Network, LLC (CIN) continue to make big strides and maintain an overall positive financial outlook, with $16,305,172 in assets. Although 2021 expenses exceeded revenue, this deficit was paid for by board-authorized transfers from income realized in 2020. The board allocated $579,874 that supports the strategic rebuilding of essential programs and benefits.

Revenue from 2020 cannot be recognized as revenue in 2021, which is why net assets are strong despite an operating deficit in 2021.

All finances are reported as consolidated.

Revenue

Non-dues revenue accounted for 62 percent of CSI’s consolidated income, meaning that the membership contributed 38 cents for every dollar of the association’s income. Out of 62 percent of income, 54 percent was attributed to product sales, conferences, and education programs, and 8 percent was attributed to interest and dividends, contributions, and other income.

Expenses

Expenses in Fiscal Year 2021 included support for conferences, technical programs, education, certification, member services, association governance, and an allocation to CSI regions. While the total expense exceeds income by $3 million, it is important to note that this deficit was a planned shortfall, and the difference was made up by board-approved transfers of revenue earned in prior fiscal years.
# Consolidated Financials

From CSI independent audit, period ending June 30, 2021

### Operating Revenue and Support

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership dues</td>
<td>$1,540,485</td>
</tr>
<tr>
<td>Product sales</td>
<td>$738,011</td>
</tr>
<tr>
<td>Educational programs</td>
<td>$622,072</td>
</tr>
<tr>
<td>Conferences</td>
<td>$699,744</td>
</tr>
<tr>
<td>Interest and dividends, net</td>
<td>$188,227</td>
</tr>
<tr>
<td>License sales</td>
<td>$147,750</td>
</tr>
<tr>
<td>Other income</td>
<td>$60,849</td>
</tr>
<tr>
<td>Contributions and grants</td>
<td>$101,643</td>
</tr>
</tbody>
</table>

**Total: $4,098,781**

### Expenses

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td></td>
</tr>
<tr>
<td>Product sales and marketing</td>
<td>$1,238,888</td>
</tr>
<tr>
<td>Educational programs</td>
<td>$565,543</td>
</tr>
<tr>
<td>Conferences</td>
<td>$315,011</td>
</tr>
<tr>
<td>Governance</td>
<td>$171,880</td>
</tr>
<tr>
<td>Technical programs</td>
<td>$942,751</td>
</tr>
<tr>
<td>Strategic initiatives</td>
<td>$579,874</td>
</tr>
</tbody>
</table>

**Total Program Services:** $3,813,947

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supporting Services</td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>$3,353,603</td>
</tr>
</tbody>
</table>

**Total Supporting Services:** $3,353,603

### Assets

<table>
<thead>
<tr>
<th>Asset</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$2,712,226</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>$407,434</td>
</tr>
<tr>
<td>Investments</td>
<td>$12,636,472</td>
</tr>
<tr>
<td>Prepaid expenses and other assets</td>
<td>$264,198</td>
</tr>
<tr>
<td>Inventory</td>
<td>$126,451</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>$158,391</td>
</tr>
</tbody>
</table>

**Total: $16,305,172**

### Liabilities

<table>
<thead>
<tr>
<th>Liability</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$1,082,412</td>
</tr>
<tr>
<td>Dues collected for local chapters</td>
<td>$120,012</td>
</tr>
<tr>
<td>Deferred membership dues</td>
<td>$968,830</td>
</tr>
<tr>
<td>Other deferred revenue</td>
<td>$427,309</td>
</tr>
<tr>
<td>Paycheck protection program loan</td>
<td>$435,722</td>
</tr>
<tr>
<td>Deferred rent</td>
<td>$25,993</td>
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</tbody>
</table>

**Total: $3,060,278**

### Net Assets

<table>
<thead>
<tr>
<th>Asset</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions</td>
<td>$12,944,402</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>$300,492</td>
</tr>
</tbody>
</table>

**Total: $13,244,894**
CSI BOARD MEMBERS
CSI Board of Directors

I think where CSI differs is we bring everybody to the table. We want the construction folks at the table, we want the architecture people, we want engineering at the table. It’s for everybody on the team, and it’s for the betterment of the project.

RACHEL NAVA, CSI, CDT®
SPECIFIER, ARCHITECH CONSULTING
PARTNERSHIP PROGRAM

Premium Sponsors:

DOWSIL®

RIB

formerly BSD

SHERWIN WILLIAMS
GOLD PARTNERS

Silver Partners

CSI ANNUAL REPORT 2020-2021

CORPORATE PARTNERSHIP PROGRAM
The CSI Foundation is a 501(c)(3) tax-exempt organization that supports research, education, and scholarships related to workforce development and construction industry leadership.

Most notable is the Let’s Build Construction Camp for Girls, a program designed for middle and high school-aged girls to attend a free week-long camp to explore the construction trades through hands-on experiences and field trips. With only 10 percent of the AECO industry represented by women, the camp is just one way CSI is helping find ways to build a more gender-diverse workforce. As a result of their engagement in the program, several women who enjoyed the program are now working in the industry.

The Foundation funded the development of a pilot program in 2020-2021 so that CSI chapters and regions can create similar programs in their own backyards.

Board of Trustees

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Ronald Geren, FCSI, Lifetime Member, CCS®, CCCA®, CSC, CDT®

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TREASURER
William (Chip) Hayward, CSI, CCCA®, CDT®

Keith West, FCSI, CCPR™, CDT®

Lane Beougher, FCSI, Lifetime Member, CCS®, CCCA®, CDT®

CHIEF EXECUTIVE OFFICER
Mark Dorsey, FASAE, CAE