BOARD CHAIR AND CEO MESSAGE

Solving your everyday professional problems and enabling architecture, engineering, and construction practitioners to perform at a higher level is central to Construction Specifications Institute’s (CSI) mission. So too is the advancement of building information management and the education of project teams to improve project facility performance. Fiscal Year 2020 was a watershed year in terms of CSI’s leadership in education and technology—as we all work together to help you make the places we live and work the best they can be.

To recap some major highlights over this past year, CSI launched a wealth of essential and revamped services including new online learning resources, local chapter events, upgrades to certification programs, and more—all designed to support your personal and professional growth. So, whether you may be learning new skills or looking for a trusted advisor to bring your work over the finish line, CSI and its members are here to help you deliver your project more effectively. Thank you for being a part of this vibrant community.

CSI’S PURPOSE

CSI drives innovation by connecting design to construction. Its members take a core concept—translating design into written description of processes and products—so that the three-dimensional project can be delivered on time and on budget while still reflecting the main intent of the owner and designer. CSI and its membership are laser-focused on the logistics of managing and delivering project information through the entire facility lifecycle, from conception through occupancy and facility management. CSI exists to make you a better professional in service of these overarching goals.

“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 that are trying to reach the same goal. And the goal that we're all trying to reach is to try 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®
Principal, KM Architectural Consulting, PLLC

ELLEN KAY CREWS
FCSI CCS™ CCCA™ CDT®
Board Chair

MARK DORSEY
FASAE CAE
Chief Executive Officer
MEMBERSHIP

Trusted Advisors
CSI gives members access to the world’s leading experts in the building trade, encompassing specialized knowledge materials and assemblies, supply chains, building processes, and operations.

Personal Support Team
CSI is renowned throughout the industry for the strength and closeness of its community. This begins with the extraordinary chapter experience that welcomes new members with introductions, professional development, and coaching. As members grow in their careers, CSI fosters contacts on a national and international basis through its conferences and online communities.

“...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

PROFESSIONAL DEVELOPMENT

Practice Communities
CSI offers several ways for members to deepen their knowledge in the field by way of four on-line practice communities: contract administration, product representation, project delivery, and specifying.

Professionals interact within the larger CSI-Connect community to share technical expertise, find solutions for their day-to-day challenges, and network with members. This exclusive member platform enables AECO professionals to connect regardless of location or job responsibilities (csiresources.org/communities).

“I went from a student studying for my architectural license, with maybe a network of 10, to then joining CSI and having a network of 100.”
BROK HOWARD, CDT® Technical Account Manager, dRofus

Learning Library
CSI’s newly launched Learning Library is a community where AECO professionals can find educational courses on topics of interest, further their professional knowledge, and earn valuable CSI Learning Units (csiresources.org/learning).

2,994 New Users 2,370 Learning Units Earned

Project Delivery Practice Guide
CSI released the Project Delivery Practice Guide (PDPG), 3rd edition, the definitive source of knowledge about construction project documentation, administration, and delivery. The PDPG is the starting point for CSI’s core technical content, and is an indispensable study aid that aligns directly with the knowledge domains for those seeking the Construction Documents Technologist (CDT®) certification.
TECHNICAL CONTENT AND STANDARDS

Development of standards and templates to improve the organization of design, specifications, and overall construction knowledge to help meet the needs of an every-changing industry—this is the heart of CSI.

MasterFormat®
MasterFormat is a standardized classification for construction information that represents broad categories of construction, project types, facility lifecycle, and maintenance. The MasterFormat standard serves as the organizational structure for construction industry publications, software, and specification products to help architects, engineers, owners, contractors, and manufacturers classify products and work results.

MasterFormat 2020 was released this year in print and digital form (csiresources.org/standards/masterformat).

OmniClass®
OmniClass is a comprehensive classification system for the full project lifecycle of a construction project and all types of construction in the built environment. While OmniClass can be used for many applications, such as filing physical materials or organizing project information, its primary function is to provide a classification structure for electronic databases and software, enriching the information used in those resources (csiresources.org/standards/omniclass).

UniFormat®
UniFormat is a standard of arranging construction information based on functional elements (or parts of a facility), without regard for the materials and methods used to accomplish them. These elements are often referred to as systems or assemblies. UniFormat is often seen in performance specifications and preliminary project descriptions. Its most notable use is in cost estimates during the schematic design phase. UniFormat breaks a facility into systems and assemblies that perform a predominating function (such as substructure, shell, interiors, and services) without defining the technical solutions to provide these functions. This enables facility pricing at the elemental level, allowing for a better evaluation of design alternatives, which also allows looking at facility performance at the system level as the project design is being refined (csiresources.org/standards/uniformat).

CERTIFICATION

More than 23,700 AECO professionals have demonstrated knowledge and skill through CSI certification programs.

Construction Documents Technologist (CDT®): Demonstrates the knowledge of writing, interpreting, enforcing, and managing construction documents and project delivery methods.

Certified Construction Contract Administrator (CCCA™): Attests to a high level of knowledge related to developing, administering, and enforcing construction documentation, with a focus on negotiating, bidding, quality assurance, quality control, and the construction, observation, and inspection process.

Certified Construction Specifier (CCS™): Demonstrates an in-depth understanding of agreements, conditions of the contract, Division 01, and how these components relate to specifications.

Certified Construction Product Representative (CCPR™): Demonstrates competencies related to being more effective in sales situations, including sales calls, presentations, construction meetings, and product shows, in addition to showing skill related to construction documentation, roles, and responsibilities.

“Learning the language of construction has made a huge difference to my career. That’s why I’ve promoted the CDT certification program to every member of my team ever since.”

CHUCK BLEAKLEY, CSI, CDT®
Specification Area Manager, PPG Industries

csiresources.org/certification/overview
The building industry has made huge strides from former environments that featured paper documents and contracts to more digital workflows. The AECO value chain—from designers to specifiers to building product manufacturers to contractors to owners and facilities managers—still remains fractured by tools that are often incompatible and inefficient, requiring multiple entries of information, file transfers, and improvised solutions.

Launched in May 2020, CROSSWALK® is a first-in-class digital classification engine for the AECO community. This tool augments the design and construction process by enabling construction technology platforms to connect through an Application Programming Interface (API), which connects to and curates versions of CSI’s construction information classifications and standards that span decades.

Who is it for? Software providers, information providers, BIM project developers, government agencies, academic institutions, research organizations, and other similar entities.

crosswalk.biz

CROSSWALK® Advisory Board

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President and CEO
The Digit Group

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McKinley Advisors

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CEO
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DIALOG

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Higher Logic

LAKISHA ANN WOODS
CAE President and CEO
National Institute of Building Sciences (NIBS)
CSI FINANCIAL PICTURE

CSI, the CSI Foundation, and the Construction Information Network (CIN) continue to make big strides and maintain an overall positive financial outlook, with $7,290,865 in assets.

The primary change from 2019 was the decision to allocate funds that support the strategic rebuilding of essential programs and benefits. Although 2020 expenses exceeded revenue, this deficit was paid for by Board-authorized transfers from income realized in 2019. Revenue from 2019 cannot be recognized as revenue in 2020, which is why net assets are strong, despite an operating deficit in 2020. All finances are reported as consolidated.

Revenue
Non-dues revenue accounted for 57 percent of CSI’s consolidated income, meaning that the membership contributed 43 cents for every dollar of the association’s income. The remaining 57 cents was generated through conferences, education programs, and related sponsorship (31 cents), as well as product and other sponsorship sales (20 cents). Contributions, interest income, grants, and miscellaneous income account for the remaining 6 cents.

Expenses
Out-of-pocket expenses in 2019-20 included support for conferences, technical programs, education, certification, member services, association governance, and an allocation to CSI regions. The expense equation also includes a non-cash allocation for depreciation. While the total expense exceeds income by $2.5 million, it is important to note that this deficit was a planned shortfall, and the difference made up by Board-approved transfers of revenue earned in prior fiscal years.

CONSOLIDATED FINANCIALS

From CSI Independent Audit, period ending June 30, 2020.

### Operating Revenue and Support

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Dues and Related Revenue</td>
<td>$1,818,247</td>
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<tr>
<td>Product Sales</td>
<td>837,010</td>
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<tr>
<td>Educational Programs</td>
<td>441,125</td>
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<tr>
<td>Conferences</td>
<td>856,385</td>
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<td>Interest and Dividends, Net</td>
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<tr>
<td>Other Income</td>
<td>109,864</td>
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<tr>
<td>Contributions and Grants</td>
<td>18,605</td>
</tr>
<tr>
<td><strong>Total Operating Revenue and Support</strong></td>
<td>$4,218,000</td>
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</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Sales and Marketing</td>
<td>$1,282,968</td>
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<tr>
<td>Educational Programs</td>
<td>1,492,213</td>
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<tr>
<td>Conferences</td>
<td>611,254</td>
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<tr>
<td>Governance</td>
<td>180,636</td>
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<tr>
<td>Technical Programs</td>
<td>346,448</td>
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<tr>
<td>Strategic Initiatives</td>
<td>756,435</td>
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<td><strong>Total Program Services</strong></td>
<td>$4,649,974</td>
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<tr>
<td>Management and General</td>
<td>2,064,309</td>
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<tr>
<td><strong>Total Supporting Services</strong></td>
<td>$2,064,309</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$6,714,283</td>
</tr>
</tbody>
</table>

### Income:

- Dues 43.1%
- Conferences 20.3%
- Product Sales 19.8%
- Education Programs 10.5%
- Interest and Dividends 3.2%
- Other Income 2.6%
- Contributions and Grants 0.4%

### Expense:

- G&A, Management 30.7%
- Education Programs 22.2%
- Product Sales and Marketing 19.1%
- Strategic Initiatives 11.0%
- Conferences 9.1%
- Technical Programs 5.2%
- Governance 2.7%

### Assets

- Cash and Cash Equivalents $1,087,231
- Accounts Receivable 255,725
- Investments 5,423,503
- Prepaid Expenses and Other Assets 297,355
- Inventory 13,302
- Property and Equipment, Net 213,749
- **Total Assets** $7,290,865

### Liabilities

- Accounts Payable and Accrued Expenses $484,336
- Accounts Receivable 255,725
- Investments 5,423,503
- Prepaid Expenses and Other Assets 297,355
- Inventory 13,302
- Property and Equipment, Net 213,749
- **Total Liabilities** $1,820,240

### Net Assets

- Without Donor Restrictions $5,470,625
- With Donor Restrictions 5,192,670
- **Total Net Assets** $7,290,865

- Without Donor Restrictions $5,470,625
- With Donor Restrictions 5,192,670
- **Total Liabilities and Net Assets** $7,290,865
CORPORATE PARTNERSHIP PROGRAM

Elevated access to members. Branding opportunities. Recognition.

CSI Corporate Partners enable CSI to explore a wide range of topics and are essential to the association’s success, offering and underwriting support for leading technology, innovative content, training, and support for certification. The Construction Specifications Institute’s Corporate Partnership Program offers companies a unique year-long marketing opportunity to establish a deeper relationship with CSI members.

Platinum

Gold

Silver

Become a CSI Corporate Partner.
csisponsorship.org
“Let’s Build Construction Camp has helped me realize what skills I have and it encourages me to work hard no matter my gender and goals (nontraditional). I’ve also gained a lot of confidence around people because of this camp, and that has helped my life in other ways other than just my career.”

PAIGE KNOWLES, Past Camper
Let’s Build Construction Camp for Girls

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 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% 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.

CSIF funded development of a pilot program so that other CSI chapters and regions can create similar programs in their own backyards.

To donate today.
csiresources.org/foundation