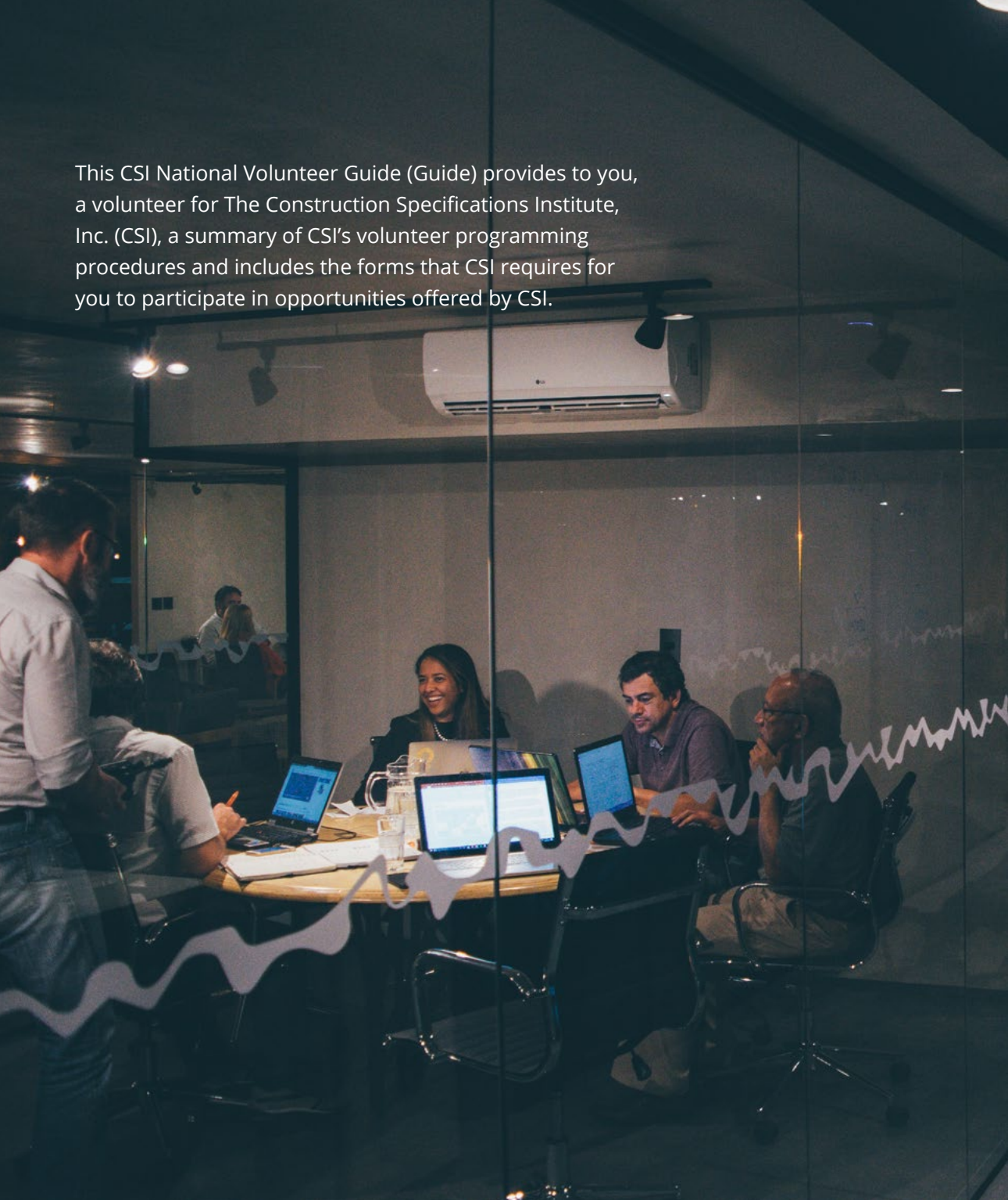




NATIONAL VOLUNTEER GUIDE



This CSI National Volunteer Guide (Guide) provides to you, a volunteer for The Construction Specifications Institute, Inc. (CSI), a summary of CSI's volunteer programming procedures and includes the forms that CSI requires for you to participate in opportunities offered by CSI.

TABLE OF CONTENTS

- 04 SECTION 1: WELCOME TO VOLUNTEERING WITH CSI!**
- 06 SECTION 2: VOLUNTEER OPPORTUNITY ORIENTATION**
 - 2.1 Applying for an Opportunity
 - 2.2 Volunteer Selection
 - 2.3 Acceptance Process
- 08 SECTION 3: VOLUNTEER OPPORTUNITY ROLES**
 - 3.1 National Board of Directors
 - 3.2 Operating Committees, Task Teams/Working Groups
 - 3.3 Liaisons
- 12 SECTION 4: VOLUNTEER RESPONSIBILITIES AND CODE OF CONDUCT**
 - 4.1 Volunteer Responsibilities
 - 4.2 Code of Conduct
 - 4.3 Diversity, Equity and Inclusion Statement
 - 4.4 Non-Harassment Policy
 - 4.5 Anti-Trust Policy
- 18 SECTION 5: VOLUNTEER TERM**
 - 5.1 Opportunity Closeout
- 20 SECTION 6: SPOTLIGHT AND FEEDBACK**
 - 6.1 Bragging Rights and Sharing Your Story
 - 6.2 Your Feedback is Important
- 22 APPENDICES**
 - Attachment A: CSI National Volunteer Letter of Commitment
 - Attachment B: CSI National Volunteer Conflict of Interest Form



WELCOME TO VOLUNTEERING WITH CSI!

Hello!

Applying to become a CSI volunteer means that you are ready to take an important step. By raising your hand to share your time, energy, and expertise, you indicate your willingness to not only give back to the architecture, engineering, construction and owner (AECO) industry, but also your desire to learn, network and lead. You also demonstrate a commitment to aid CSI in advancing its mission forward. Through volunteering, you'll begin new relationships with CSI staff and your industry peers and celebrate together as we meet milestones.

Some volunteer commitments span years, while others may only last a few hours. However long you volunteer with CSI, we recognize the importance of your time and we hope that you will take away new experiences and memories through networking, learning, and having fun as a CSI volunteer!

There are a variety of different CSI volunteer opportunities with your local CSI chapter, your region, or at the national level. This Guide focuses on national-level CSI volunteer opportunities, how to get started as a CSI volunteer and what to expect during your time as a CSI volunteer.

If you are interested in volunteering for your local CSI chapter, please visit: <https://www.csiresources.org/communities/components> and reach out to your local CSI chapter to let them know you are ready to serve. You can reach CSI's Component Relations team at chapterrelations@csinet.org.

Please send questions regarding this Guide to Volunteer@csinet.org. Without you, our volunteers, CSI would be unable to turn our goals into accomplishments. We thank you in advance for the projects you are about to tackle. We are so excited to have you as a CSI volunteer!

~ CSI Staff



VOLUNTEER ORIENTATION

2.1 Applying for an Opportunity

CSI hosts a Volunteer Opportunity Portal (Portal) located at:

<https://www.csiresources.org/volunteeropportunities/opportunities-list-public>

Throughout the year, CSI puts new postings on the Portal that offer a variety of ways to volunteer for CSI. You will need to fill out and submit your application through Portal to start volunteering and to help CSI track volunteer applications. To apply for a CSI volunteer opportunity, set up or use your existing CSI account, log into the Portal, and read the volunteer opportunity descriptions, deliverables, and eligibility requirements carefully before applying.

2.2 Volunteer Selection

After you apply, watch for an email from CSI about your application. CSI will either offer to you a volunteer position or notify you that all volunteer positions have been filled. If you don't get your first pick, please don't get discouraged. CSI determines its offers based on such factors as available space, specific experience requirements, and whether you appear to have adequate time for the position.

2.3 Acceptance Process

Once you have been selected to serve as a CSI Volunteer, CSI requires that you review, sign and complete the attached CSI Volunteer Letter of Commitment (Attachment A) and CSI Volunteer Conflict of Interest Form (Attachment B) and return them to Volunteer@csinet.org. CSI may also ask you to participate in scheduling polls, review training materials, etc. A CSI Staff member will provide guidance to you. Please ask questions along the way.



NATIONAL BOARD OF DIRECTORS

The volunteer roles described in this section are open to all CSI members who meet the qualifications.

3.1 National Board of Directors

If you are selected to serve on the National Board of Directors, CSI will provide you with a Board manual, which includes the Board of Directors Governing Policies, for your review and reference during your Board tenure. CSI's CEO and executive staff will also furnish you with support and leadership training to provide the tools you need to be successful in your new Board role.

3.2 Operating Committees, Task Teams/Working Groups

3.2.2 Operating Committees

CSI Operating Committee (OCs) are CSI volunteer groups established to help the CSI staff be more effective and efficient in their work. You can find a list of current OCs and their descriptions at:

<https://www.csiresources.org/communities/volunteer/volunteer-committees>

OCs: 1) are established by the CSI CEO and are assisted by CSI staff; 2) help the CSI staff and organization do its job; 3) undertake activities delegated to the CEO and staff and help complete CSI's work within certain parameters; 4) speak for the Board or CSI staff, or spend CSI funds or resources, only when and for the purpose that the CEO gives the OC that authority; 5) are reviewed annually to assure continuity and relevance to CSI; 6) are chaired by volunteers who may serve up to two one-year terms; and 7) provide to their volunteers their own OC policies.

3.2.3 Task Teams/Working Groups

CSI Task Teams and Working Groups are temporary groups that CSI forms to accomplish a specific CSI task or project. You can find a list of sample

Task Teams and Working Groups and their descriptions at:

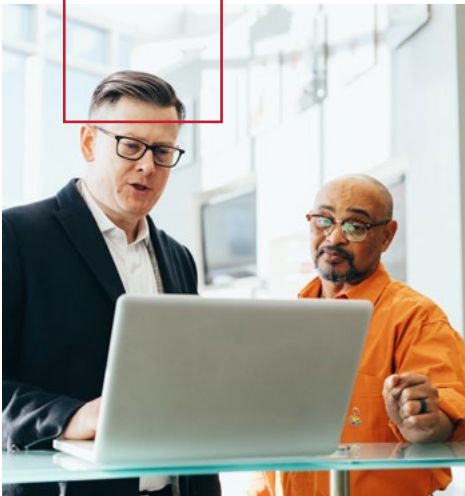
<https://www.csiresources.org/communities/volunteer/volunteer-committees/task-teams-working-groups>

3.3 Liaisons

CSI Liaisons are individuals that represent CSI on outside industry committees and taskforces. Liaisons work closely with CSI staff to understand and articulate CSI's positioning, then represent the interests of CSI, speak on behalf of CSI, and listen and report back to CSI. Liaisons foster or reinforce communications between CSI and outside organizations and ensure concerted action, cooperation and mutual support. You can find a list of current CSI Liaisons and related guidelines at:

<https://www.csiresources.org/communities/volunteer/volunteer-committees/volunteer-liaisons>





VOLUNTEER RESPONSIBILITIES AND VOLUNTEER CODE OF CONDUCT

4.1 Volunteer Responsibilities

Your engagement and participation as a CSI volunteer is integral to CSI's success. As a CSI volunteer, CSI expects you to fulfill the following responsibilities:

4.1.1. Annual Commitment

Initially and each year, you must review and sign the CSI Volunteer Agreement indicating that you will abide by the Volunteer Code of Conduct and any other policies that CSI provides to you.

4.1.2. Attendance

Attend scheduled meetings on a regular and punctual basis. If you are absent without excuse from more than one-third of the scheduled meetings related to your volunteer position in any year, you will be removed from your volunteer position.

4.1.3. Preparation and Participation

Always review materials related to your volunteer position and participate productively in discussions.

4.1.4. Responsiveness

Acknowledge and respond to communications related to your volunteer position.

4.2 Volunteer Code of Conduct

As a CSI volunteer, you must act ethically, professionally, and lawfully. This includes always observing the following rules and any other rules that CSI provides to you:

4.2.1. Conflict of Interest Avoidance

As a CSI volunteer, you must avoid any conflict of interest or the appearance of a conflict of interest. Specifically, you, your family or your

business: 1) may not engage in self-dealing, conducting private business or personal services with or for CSI, or benefit financially from your volunteer relationship with CSI, except as CSI pre-approves; 2) must disclose to CSI any actual or potential conflict of interest, and refrain from any action until CSI determines there is no conflict of interest; 3) not exert undue influence to obtain CSI staff employment for yourself, your family or other individuals; 4) complete and provide to CSI initially, annually and with each applicable change of circumstance, a CSI Volunteer Conflict of Interest Form (Attachment B).

4.2.2. Lack of Authority as Individuals

As a CSI volunteer, you may not attempt to exercise individual authority over CSI. You may not, without CSI's prior written consent, speak or act on behalf of CSI or obligate CSI in any way.

4.2.3. Confidentiality

All information that CSI provides to you as a CSI volunteer is confidential and you will not, without CSI's prior written consent, disclose that to any third party.

If you volunteer to work on CSI certification programs, you may not:

1) during the term of your volunteer services, apply to sit for any CSI certification examination; or 2) during and for five years after your volunteer service: a) participate or teach courses/study groups designed to prepare persons for any CSI certification examinations; b) develop or assist in developing materials designed to prepare individuals for CSI certification examinations (ex. practice guides, workbooks, flash cards); c) author or co-author source or study materials related to CSI certification exams; d) coach or mentor other students, candidates, co-workers, AEC professionals, CSI members at a chapter/region or national level; or d) serve as a CSI chapter/region Certification Chair or related position.

4.2.4. Obligation to Address Concerns

If you become aware of credible information that suggests that anyone has violated this Code of Conduct, you must notify CSI's CEO immediately. If the CEO is the subject of the concern, you must notify the Board Chair.

4.2.5. Process to Address Concerns Regarding Volunteer Actions

If you violate this Code of Conduct: 1) CSI's CEO will have an informal discussion with you; 2) if this discussion does not resolve CSI's concern, CSI's CEO will discuss the issue with the Board Chair, who may put the issue on the agenda for closed session of the Board; and 3) if the Board finds that you have violated this Code of Conduct, the Board may take action consistent with the Bylaws.

4.3 Diversity, Equity and Inclusion Statement

CSI encourages and cultivates a diverse, equitable, and inclusive culture. These tenets are critical to the strength of not just the AECO industry, but all industries. CSI is committed to: 1) recognizing that we are able to grow and learn better together with a diverse team of employees and members; 2) acknowledging that the collective sum of the individual differences, life experiences, knowledge, innovation, self-expression, and talent that our employees, members and volunteers invest in this industry represent our culture, our reputation, and achievements; and 3) welcoming the unique contributions that volunteers and potential team members bring, including education, opinions, culture, ethnicity, race, sex, gender identity and expression, nation of origin, age, languages spoken, veteran's status, color, religion, disability, sexual orientation and beliefs.

4.4 Non-Harassment Policy

CSI strictly prohibits harassment in the workplace in accordance with applicable laws, including harassment based on a person's sex, race, age, disability, religion, sexual orientation, ancestry or ethnic group. Some forms of harassment include, among other things, derogatory or

unwelcome comments, whether verbal, written or graphic, or actions referring or directed to a person's race, gender or ethnic group in circumstances reasonably viewed as offensive to the individual involved and which undermine a proper working environment. CSI will not tolerate any type of prohibited harassment.

4.5 Anti-Trust Policy

CSI strictly complies with the federal antitrust laws. The antitrust laws prohibit certain combinations and agreements among competitors, and you can be considered a competitor in the context of antitrust challenges even if your businesses (or professional practices) are not in the same geographic areas or in the same product lines (or professional fields or specialties) as those of CSI. Your conduct at all CSI-sponsored or scheduled meetings and events must comply with antitrust laws. The penalties for violations of the antitrust laws can be very severe—not only for CSI, but also for you.

You may not come to understandings, make agreements, or otherwise concur on positions or activities that in any way tend to raise, lower, or stabilize prices or fees, divide up markets, or encourage boycotts. You must decide, without consultation with competitors, how to conduct your business (or its professional practice) and with whom to do business (or engage in professional practice).

You should not: 1) agree on current or future prices or fees, price or fee changes, discounting, regulation of production, and other terms and conditions of sale or of providing professional services; 2) discuss or agree on prices or fees. Price or fee discussions by competitors, if followed by parallel action among the competitors on pricing or fees, can lead to antitrust investigations or challenges; 3) allocate or monopolize territories or customers; 4) refuse to do business with those whose business practices you oppose or threaten directly or indirectly to act jointly to enforce

changes to those policies or practices; 5) discuss pricing, fees, or boycotts as part of CSI-scheduled programming or at sponsored meetings; or 6) make any representations, publicly or privately, which appear to represent an official policy or position of CSI without CSI's prior written consent.

If you are concerned that you may be in a "gray area," you must consult with CSI's senior executives or legal counsel. If the conversation among competitors at a CSI meeting turns to antitrust-sensitive issues, you should discontinue the conversation until you obtain legal advice.



SECTION



VOLUNTEER TERM

Most CSI volunteer opportunities end after a period of time but sometimes they end on a specific date. In either case, CSI will let you know when your volunteer term ends.





SPOTLIGHT AND FEEDBACK

6.1 Bragging Rights and Sharing your Story

CSI enjoys shining the spotlight on our volunteers. Please let us know if you prefer not to be featured in videos, photos, or articles that may appear on the CSI website, newsletters, emails, or social media. We will honor requests for privacy and will never share or sell your information. We hope you will also take part in sharing your volunteer experience with your network as well! Let us know if we can interview you about your experience. We also would appreciate you sharing our posts on social media, which may catch the eye of someone who is considering volunteering. We are always looking to grow our CSI volunteer pool and hearing your story may inspire the next person to raise their hand!

6.2 Your Feedback is Important

CSI always welcomes feedback, which you may email to your CSI Staff Contact or send to Volunteer@csinet.org. CSI will also provide to you, each year, a Volunteer Survey to complete.

**THE CONSTRUCTION SPECIFICATIONS INSTITUTE, INC.
VOLUNTEER LETTER OF COMMITMENT**

Thank you for your interest in volunteering your time and expertise to us at The Construction Specifications Institute, Inc. (CSI). Volunteers like you are CSI's lifeblood, enabling CSI to create products and services to support CSI members and to serve the construction industry. To help you have a robust, fulfilling, and productive volunteer experience, please review and indicate your agreement with the following.

As a CSI Volunteer, you will:

1. Support CSI's goals and objectives as provided by CSI.
2. Comply with the CSI Volunteer Code of Conduct as detailed in the CSI National Volunteer Guide and all updates to that Guide, available online or from us.
3. Acknowledge that CSI will not pay you, not give you any employment benefits and not insure you or your property during your time as a Volunteer.
4. Acknowledge that you or CSI may end your Volunteer status at any time.
5. Avoid any action that conflicts with CSI or that may hurt CSI's reputation.
6. Complete and provide to CSI initially, annually and with each applicable change of circumstance, a CSI Volunteer Conflict of Interest Form.
7. Participate in training that CSI requires.
8. Get CSI's written permission before you: a) speak or issue statements on CSI's behalf; b) use or allow others to use CSI's name or CSI's intellectual properties; or c) commit CSI's resources or funds to any purpose.

9. Return to CSI all CSI property when you finish using it and when you stop being a Volunteer.
10. Treat as confidential all information that CSI gives to you or that you learn about us as a Volunteer. You will get CSI's written permission before you share that confidential information with anyone and will return that confidential information to us when CSI asks or when you stop being a Volunteer.
11. Acknowledge that CSI: a) owns everything that you create for CSI as a CSI Volunteer, including all intellectual property rights in those creations; b) may, but are not obligated to, use those creations; and c) may edit or modify those creations in any way. CSI will not own things that can show you gathered before and independently of being a CSI Volunteer.
12. Allow us, unless you otherwise notify us in writing, to: a) record and to use in any media, without reservation or compensation, your name, face, likeness, voice, or appearance as a CSI Volunteer; and b) list your name and address on CSI Volunteer rosters.
13. Fulfill your time commitments to us and tell us when you are unable to comply with this Letter or want to stop being a Volunteer.

Thank you again for your volunteer service to CSI and for lending your talent to further our profession. Please indicate your agreement with this Letter by signing below.

Signature: _____

Date: _____

This PDF contains fillable form fields and can be downloaded to complete.

ATTACHMENT B

THE CONSTRUCTION SPECIFICATIONS INSTITUTE, INC.
VOLUNTEER CONFLICT OF INTEREST FORM

I, the undersigned CSI Volunteer:

- 1. Affirm that I received, reviewed and understood the CSI Volunteer Guide, which includes the Volunteer Conflict of Interest policy.
- 2. Describe below any relationships, transactions, or positions which I or a member of your immediate family hold (volunteer or otherwise), or circumstances that I believe may be a conflict of interest between CSI and your personal interests, financial or otherwise during your term of volunteer service. This may include, but is not limited to, acting as a director of or consultant to another nonprofit organization, or owning a business that might provide goods or services to CSI.

_____ I have no conflict of interest to report.

_____ I have the following potential or actual conflicts of interest to report:

Attach additional sheets as necessary and report any changes in conflicts to CSI immediately.

Signature: _____

Printed Name: _____

Date: _____

This PDF contains fillable form fields and can be downloaded to complete.





WWW.CSIRESOURCES.ORG