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

CSI’s focus and purpose are to create standards and advance best practices in the vast, ever-changing construction industry, and it has held steadfastly to this commitment throughout its 75-year history. We exist to equip you with the tools, knowledge, and community you need to manage and deliver project information, from conception through occupancy. CSI is here to help you make a positive impact with the work you do.

“One thing I think CSI has done historically better than any other organization in this industry is that it crosses all disciplines, including architect, engineer, contractor, owner, and supplier. When you attend an event, or go to a lunch and learn, or a building tour, it gives you a chance to not only talk to like-minded folks in your particular discipline but also to get better at understanding what everyone else on a project does too.”

— Dean M. Bortz, FCSI, CCP™, CDT®, Professor of Construction Management, Columbus State Community College
REALIZE YOUR FULL POTENTIAL

As the CSI community celebrates its 75th anniversary, we can all reflect on the meaningful impact our association has made in advancing the communication of construction information. At the same time, this landmark also serves as an opportunity to ask ourselves, “What does this organization need in order to stay relevant and move forward?”

While that question lets us dream about CSI’s future potential, it also reminds us that whatever we do, our association must continue its tradition of being the interdisciplinary nexus of our industry, where all the professions can come together and learn from each other so we can do our best work, independently and collectively. We need to collectively prepare ourselves for the changes and challenges we face as an architecture, engineering, construction, and owner (AECO) industry.

For that to become a reality, CSI must be a place to connect ideas, a place of true belonging, and a place for action, to ensure alignment with CSI’s values, and to deliver functional results and timely knowledge to our community.

In FY2023, we continue to be the great roundtable of the AECO industry. When people find us, they find a place they can belong, no matter who they are, or what they do for work.

CSI needs to be a place that encourages and honors dialogue, where all voices are heard, and where we are willing to question ourselves and our profession as we determine how to best move forward.

In the CSI we are building, AECO professionals will enjoy an environment that helps them realize their full professional potential.

Cam Featherstonhaugh IV, CSI, CDT®
Chair, CSI Board of Directors
FUTURE READY

When CSI strives to be a place to connect ideas, a place of true belonging, and a place for action, it helps us all be more ready for the future.

That is why with Crosswalk® we are further integrating CSI-developed standards, including MasterFormat®, Uniformat®, and OmniClass®, into design and construction software to make it easier for you to take action in delivering quality results with your work.

That dedication to helping you navigate the changes ahead is also why CSI’s Learning Library offers free and low-cost on-demand content to thousands of individual users. Articles and advice from your peers are offered daily to tens of thousands of readers through the CSI website, The Construction Specifier, and related communities. These resources connect you to new ideas to enhance how you think about solving the work challenges you face.

And to enhance how we make CSI feel like a place where you belong, we’ve standardized how chapters, regions, and the national organization connect so we can deliver more for you, more consistently, wherever you are.

All of this reminds me that CSI exists for one reason: To give you what you need to thrive in your careers, to build amazing spaces, and to make the work we do more masterful and meaningful.

Mark Dorsey, FASAE, CAE
CSI Chief Executive Officer
A PLACE TO CONNECT IDEAS
LEARNING

CSI is committed to elevating all AECO professions, which compels us to provide learning experiences that meet our community where they are when they need it. Through online learning, in-person events, and publications, we’re supplying core knowledge to help solve today’s industry challenges.

CSI LEARNING LIBRARY
This online resource provides on-demand courses that offer learning units in topics such as building information modeling (BIM), sustainability, project delivery, and specifications. We’ve also added a new Specs 101 series that defines how anyone on the project team should write, read, and use specifications throughout the overall project.

WEBINARS
Every two weeks, we offer engaging webinars that feature the latest product innovations and trends.

PRACTICE GUIDES
We regularly develop and update the CSI practice guides, essential 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.

CSI NATIONAL CONFERENCE
The 2022 CSI National Conference was a sellout for the second consecutive year due to programming excellence and opportunities to connect with industry peers. More than 400 attendees were in Denver, CO, to grow their knowledge and network. This boutique-style event is intentionally designed to connect those from all corners of the AECO industry, highlighting our association’s commitment to building an inclusive learning community.
PRACTICE COMMUNITIES
CSI 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.

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.

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

THOUSANDS OF INDUSTRY PROFESSIONALS EXPANDED THEIR KNOWLEDGE IN FY23:

- LEARNING LIBRARY COURSES: 234
- CSI LEARNING UNITS EARNED: 4,645
- WEBINARS: 43
- WEBINAR LIVE ATTENDEES: 3,766
- LEARNING LIBRARY ACTIVE USERS: 3,056
- THE SPECIFIER CIRCULATION: 28,000+

> Learn more at csiresources.org/learning/overview
CSI CERTIFICATIONS

CSI’s professional certifications attest to your understanding of the entire construction process, including documentation development and administration, specification writing and enforcement, product research and sourcing, and communication with the design and contracting teams.

CONSTRUCTION DOCUMENTS TECHNOLOGIST (CDT®)
CDT® certification attests to the knowledge of writing, interpreting, enforcing, and managing construction documents and project delivery methods.

CERTIFIED CONSTRUCTION SPECIFIER (CCS®)
CCS® certification attests to an in-depth understanding of agreements, contract conditions, a project’s general requirements, and their relationship to specifications.

CERTIFIED CONSTRUCTION CONTRACT ADMINISTRATOR (CCCA®)
CCCA® certification attests to a high level of knowledge related to developing, administering, and enforcing construction documentation, focusing on negotiating, bidding, quality assurance, quality control, and the construction, observation, and inspection process.

CERTIFIED CONSTRUCTION PRODUCT REPRESENTATIVE (CCPR™)
CCPR™ certification attests to your effectiveness in sales situations, including sales calls, presentations, construction meetings, and product shows, in addition to showing skills related to construction documentation, roles, and responsibilities.

Every step of gaining CSI certification improved my ability to successfully perform my work. It also increased the value and confidence in my knowledge of construction contracting. Preparation for each built my expertise and helped make me a reliable expert resource for my employers. It served me well as an architect, construction administrator, and specification manager.”

— Paul M. Sternberg, CSI, CCS®, CCCA®
Staff Architect, Ball State University Facilities Planning & Management
A PLACE OF TRUE BELONGING
A TRUSTED NETWORK

CSI connects you to a network of professionals who understand the challenges of working in the AECO field and are dedicated to finding solutions to move the industry forward. Whether it’s online or in person, in your local community, or on a national scale, being a part of CSI lets you connect, engage, share information, and trade best practices in real time while building professional relationships that can last a lifetime.

In this fiscal year, we also enhanced membership to allow better connections. CSI members not only get access to a home chapter but can also participate in activities with every chapter across the country.

“For those who specify products or are looking to get their products into specifications, there isn’t a better organization than CSI. The education and networking opportunities are outstanding.”

— Jill R. Goedken, CSI, CCS®
SPECcetera LLC
BUILT FOR ALL

CSI realizes that the built environment impacts many different people, from those who envision projects to those who help realize them. 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.

At CSI, we seek out and value diversity, 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, and remain inclusive by design.

CSI’S REACH ENSURES OUR INDUSTRY STAYS CONNECTED:

- **CSI CONNECT MEMBERS:** 6,300+
- **LINKEDIN COMMUNITY:** 20,000+
- **FACEBOOK FOLLOWERS:** 4,700+
- **X (FORMERLY TWITTER) FOLLOWERS:** 8,000+
- **CSI WEEKLY NEWSLETTER SUBSCRIBERS:** 44,000+
- **CSI CHAPTERS:** 107 IN 10 REGIONS
MEMBERSHIP MAKEUP

CSI MEMBERS BY ORGANIZATION TYPE:

- Architecture and Engineering Firms: 51%
- Manufacturing: 28%
- Other: 10%
- Contracting, Development and Management: 8%
- Government: 2%
- Academic and Association: 1%

CSI MEMBERS BY OCCUPATION:

- Architecture and Design: 34%
- Construction and Contractors: 16%
- Specifiers: 15%
- Engineering: 10%
- Other: 5%
- Building Product Manufacturers: 20%
CSI CHAPTERS AND REGIONS

With 106 local chapters in 10 regions, plus one virtual chapter, members have access to a wide range of resources at their doorstep. Chapters and regions provide members with valuable local networking opportunities, professional development, community building, and resources.

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

NORTH CENTRAL REGION
- Central Iowa
- Central Missouri
- Chicago
- Crandic
- Flint Hills
- Fox River Valley
- Greater Saint Louis
- Kansas City
- Madison Wisconsin
- Mid-Kansas
- Milwaukee
- Minneapolis-St. Paul
- Nebraska
- North Dakota-Red River Valley
- Southwest Missouri
- Twin Ports

GREAT LAKES REGION
- Akron-Canton
- Cincinnati
- Cleveland
- Evansville
- Grand Rapids
- Indianapolis
- Lansing
- Louisville
- Metropolitan Detroit

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

continued on next page »
CSI CHAPERS AND REGIONS

MIDDLE ATLANTIC REGION
Baltimore
Blue Ridge
Central Pennsylvania
Central Virginia
District of Columbia
Metropolitan
Erie-Northwestern Pennsylvania
Greater Lehigh Valley
Northcentral Penn
Northern Virginia
Philadelphia
Pittsburgh
Richmond
Tidewater Virginia

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

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

SOUTHEAST REGION
Atlanta
Charleston
Charlotte
Grand Strand
Greater Orlando
Greenville
Raleigh-Durham
South Florida
Suncoast
Tampa Bay

GULF STATES REGION
Acadiana
Baton Rouge
Birmingham
Chattanooga
Huntsville
Knoxville
Little Rock
Memphis
Mississippi
Montgomery
Nashville
New Orleans
Pensacola Florida
A PLACE FOR ACTION TO DELIVER FUNCTIONAL RESULTS
STANDARDS

For over 50 years, CSI has provided standards — including MasterFormat®, UniFormat®, and OmniClass® — to help construction professionals communicate and organize information. The use of these standards is core to helping those in our community establish themselves as authorities that can provide accuracy, efficiency and organization in project delivery.

MASTERFORMAT®
The 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. It’s useful for early project design documentation, cost analysis, and evaluation of how design alternatives affect facility performance.

OMNICLASS®
A comprehensive classification structure for electronic databases and software, encompassing vital elements of both MasterFormat® and UniFormat®. This tool is beneficial in building information modeling (BIM) to organize and retrieve project data.

» Explore more at csiresources.org/standards/overview

CROSSWALK®
A platform that enhances design, construction, and facilities management software by integrating CSI standards through an application programming interface (API).
We continued our innovation of the product this fiscal year with the addition of a suite of integrations with productivity applications, including Crosswalk® for Microsoft Word, Excel, Revit, and Procore. These integrations add convenience, save time, and lead to greater accuracy.

» Learn more at crosswalk.biz
OVERVIEW

CSI, the CSI Foundation, and the Construction Information Network, LLC (CIN) continue to make strides and maintain an overall positive financial outlook, with $10,638,994 in assets. Although Fiscal Year 2023 expenses exceeded revenue, this deficit was paid for by board-authorized transfers from income realized in FY22. The board allocated $556,316 that supports the strategic building of essential programs and benefits.

All finances are reported as consolidated.

REVENUE

Non-dues revenue accounted for 72 percent of CSI’s consolidated income, meaning that the membership contributed 28 cents for every dollar of the association’s income. Out of 72 percent of income, 67 percent was attributed to product sales, conferences, and education programs, and 5 percent was attributed to interest and dividends, contributions, and other income.

EXPENSES

Expenses in FY23 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 $2.7 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 the CSI independent audit, period ending June 30, 2023.

<table>
<thead>
<tr>
<th>OPERATING REVENUE AND SUPPORT</th>
<th>Membership dues</th>
<th>$1,445,423</th>
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<tbody>
<tr>
<td></td>
<td>Product sales</td>
<td>$770,188</td>
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<td>Educational programs</td>
<td>$713,865</td>
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<tr>
<td></td>
<td>Conference, sponsorship, and registration</td>
<td>$1,614,999</td>
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<tr>
<td></td>
<td>Interest and dividends, net</td>
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<td>License sales</td>
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<td>Other income</td>
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<tr>
<td></td>
<td>Contributions and grants</td>
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<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>Program services</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Product sales</td>
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<tr>
<td></td>
<td>Marketing</td>
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<td></td>
<td>Community</td>
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<td></td>
<td>Strategic initiatives</td>
</tr>
</tbody>
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| Supporting services           | Management and general | $3,092,947 |

| ASSETS                        | Cash and cash equivalents | $635,779 |
|-------------------------------| Accounts receivable | $51,153 |
|                               | Investments         | $8,812,358 |
|                               | Prepaid expenses and other assets | $363,281 |
|                               | Inventory           | $19,656 |
|                               | Property and equipment, net | $115,055 |
|                               | Right-of-use asset, net | $641,712 |

| LIABILITIES                   | Line of credit | $200,000 |
|-------------------------------| Accounts payable and accrued expenses | $737,809 |
|                               | Dues collected for local chapters | $191,687 |
|                               | Deferred membership dues | $925,966 |
|                               | Other deferred revenue | $1,010,095 |
|                               | Operating lease liability | $689,923 |

| NET ASSETS                    | Without donor restrictions | $6,591,433 |
|-------------------------------| With donor restrictions | $292,081 |
CSI BOARD OF DIRECTORS

Cam Featherstonhaugh IV, CSI, CDT®
Chair

William Sundquist, FCSI
Chair-Elect

Jori Smith, CSI, CDT®
Secretary

Michael Young, FCSI, CCS®, CCCA®, CDT®
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Director, CSI At-Large

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Director, West Region

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Director, Middle Atlantic Region

Andrea Zawodny, CSI, CCS®, CDT®
Director, North Central Region

Mark Dorsey, CAE, FASAE
Chief Executive Officer (Ex-Officio)
PLATINUM PARTNERS

EXCLUSIVE METAL WALL AND ROOF PANEL PRODUCTS/SERVICES
PLATINUM PARTNER:

ATAS International, Inc.
Sustainable Building Envelope Technology

EXCLUSIVE ARCHITECTURAL WOODWORK ACCREDITATION
PLATINUM PARTNER:

AWI Architectural Woodwork Institute
Quality Certification Program

EXCLUSIVE SOFTWARE
PLATINUM PARTNER:

RIB

EXCLUSIVE PAINT AND COATINGS
PLATINUM PARTNER:

Sherwin-Williams

EXCLUSIVE JOINT SEALANTS
PLATINUM PARTNER:

Tower Sealants

EXCLUSIVE CEILINGS
PLATINUM PARTNER:

USG
GOLD PARTNERS
CSI FOUNDATION

The CSI Foundation is a 501(c)(3) tax-exempt organization that supports research, education, and scholarship related to the built environment and in alignment with the goals and objectives of CSI. Donations to the CSI Foundation will help influence the future of specifications, specifiers, and the construction industry.

CSI FOUNDATION SCHOLARSHIPS
Access to professional development should not have limits. That’s why the CSI Foundation launched new scholarships to help aspiring AECO professionals attend professional development to enhance their skills or gain a CSI certification.

CSI FOUNDATION CONSTRUCTION CAMP FOR GIRLS
We continue to grow our CSI Foundation Construction Camp for Girls by adding more CSI chapter hosts across the country. These free, week-long camps provide young women an opportunity to explore the world of building. Through hands-on experience and projects, the campers walk through the exploration of the architecture, engineering, and construction fields.

» Learn more at csiresources.org/foundation
CSI FOUNDATION BOARD OF TRUSTEES

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William (Bill) DuBois, CSI, CCS®, CDT®
Vice Chair

Monique Birault, CSI, CDT®
Secretary

Michael (Mike) Young, FCSI, CCS®, CCCA®, CDT®
Treasurer

Keith West, FCSI, CCPRTM, CDT®
Trustee

Glenn Remler, CSI
Trustee

Mark Dorsey, CAE, FASAE
Chief Executive Officer
(Ex-Officio)