



Construction Specifications Institute

Indianapolis Chapter

STRATEGIC PLAN FY20 – FY25

MAY 2020



Mission Statement

Institute: The mission of CSI is to advance building information management and education of project teams to improve facility performance.

Region: To further advance the mission statement of the Institute and to provide support to the Region chapters to realize their goals

Indianapolis Chapter: To further advance the mission statement of the institute and to advance education, communication and community within the design industry in the Indianapolis area.

Values

Institute: CSI is an association dedicated to improving organization, management, and communication of building information through:

- A diversified membership base of allied professionals involved in the creation and management of the built environment
- Continuous development and transformation of standards and formats
- Education and certification of professionals to improve project delivery processes
- Creation of practice tools to assist users throughout the facility life-cycle

Region:

- Access to varied knowledgeable people with a common interest in the construction industry
- Resources to find specific answers
- Education of Region chairs which in turn educate the Chapter Chairs

Indianapolis Chapter:

- Education of Chapter members.
- Encourage diversified membership base
- Foster joint programs with other industry organizations
- Improve communications among design industry members
- Encourage certification and provide certification study classes
- Provide opportunity for manufacturers and industry members to demonstrate latest advancements in products and systems
- Extend invitation to area design industry members

EXECUTIVE SUMMARY

Reason for a Strategic Plan:

Develop a plan, revisited each year on how to support CSI Committees and Members

Develop accountability for the Chapter Leadership as well as develop expectations for the members

How do we accomplish these goals

Marketing CSI

- What gets people interested and how do we keep them: Attrition vs Retainage
- Develop a marketing strategy
- Awards (craftsmanship, not just service)

Being a Resource:

- Industry involvement
- Technical involvement
- Programs

Planning Assistance

- Active Role in Region/Institute
- Involving Committee Chairs and Members
- Leadership training
- Transparency with members

Strategic Objectives

Grow/Develop Membership - Membership is the heart of CSI. To support and strengthen chapter and develop synergy among design industry to harness the energy and innovation within CSI

Promote Education Opportunities – Expand the scope and relevance of CSI educational programs and certifications to be valuable to all design industry members.

Develop Long Term Financial Plans – Improve the ability to quantify the financial impact of CSI programs and services. Identify, develop and maximize alternative revenue streams.

Develop/Implement Marketing Strategy - Nurture industry alliances and synergies to maximize the visibility and impact of the building information community.

Improve Communication – Strengthen and expand understanding of CSI’s role and resources. Integrate CSI Standards and formats into current project delivery practice

Develop/Implement Leadership Training Programs – Train future leaders for CSI Indianapolis Chapter’s continued success.

Strategic Objective	CSI Member Perspective	Chapter Perspective	Construction Industry Perspective
Grow/Develop Membership	Encouraging young professionals to Join/Attend	Member Retention ; Diversity	Forum for Exchange of Ideas Review best practices of other organizations
Promote Education Opportunities	Provide certification classes	Relevant programs	Facilitate Innovation
Develop Long Term Financial Plan	Develop/Improving other sources of income	Reach out to Non-members	Trade Show Golf Outing
Develop/Implement Marketing Strategy	Website	Calendar Flyers	Social Media
Improve Communication	Newsletter	Emails Website Social Media	CSI Standards and Resources; Institute Website
Develop/Implement Leadership Training Program	Encourage leadership (Board, Committees) involvement	Offer training for leadership positions	Indianapolis website videos; GLR website videos

Strategic Objective: Grow/Develop Membership

Improve Membership Quality, Diversity and Involvement

Committees: Membership, Academic, Education, Programs

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
Target More Contractors, Architects and Student Members	Contractors – Engage company principals through relationships and trade associations	Reaching out to: - AGC - ABC - DBIA - Subcontractors - Independent firms - ASI > path to subs - ASPE - AACE - BEC	Recruit [5] new members from these groups per year	Identify top Contracting Firms in Indianapolis. Approach on benefits of membership
	Architects - Engage company principals through relationships	Collaborating with: - AIA - DBIA - USGBC - Interior Designers - Engineers	Monthly attendance from each group.	Identify top Architecture Firms in Indianapolis. Approach on benefits of membership
	Students – Academic Affairs Committee engaging A/E/C/College programs	Organizing students chapters at: - Ball State CAP - IUPUI - PU - ISU	Targeted minimum [10] student members at each campus.	
Promote CSI Membership Values	Effective promotion Flyers and programs in which the members are interested	Mentoring Program Social Hour at Meetings Following up throughout the Month with new members		Printed Materials – From Institute, Indy Chapter Developed
	Increase Attendance	Career Development		

Strategic Objective: Promote Educational Opportunities

Program enhancements, Define “education” or “program”

Committees: Education, Programs, Certification

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
Diversity Education Webinars/Workshops and Programs (CEUs)	Think outside the box while incorporating new technologies and addressing challenges in the Construction Industry	Incorporate non-traditional format. Team Participation	Improve Attendance	
Increase Participation in Certification Program	Promote certification programs to Facility Managers; Architecture Firms; Government Entities	Educate the industry about the value of certification with actual Case Studies as part of the education materials	Increase firm endorsement	
	Promote certification programs to members	A/E members to lead by example on taking certifications and encourage the contractors on their projects to get certified. Cross promotion Professional Development	. Increase certified A/E members by [10%]	

Strategic Objective: Develop long term financial plan

Increase revenue to sustain/improve our long-range fiscal position

Committees: Chapter Treasurer, Sponsorship Committee

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
Increase long term sponsorship	Promote the great values of being long term CSI Chapter Sponsors	Develop an effective sponsorship benefit package for all levels of sponsorships	Sponsorships for all levels	
	Develop unique & fun fundraiser and events for sponsorships opportunities. (Non-traditional formats that set our event apart from others)	Sponsorships and Team Entry Fees for: - Golf Outing - Trade Show	Fund raising goals: - Golf Outing - Trade Show	
	More promotions – Early and often. Collaborate with Marketing Committee for early promotion.	Develop effective flyers for early distributions via various publications- Building Excellence, CSI Websites, Constant Contact Event registration, etc.	Increase attendance by [10%]	
Fees for Programs, Seminars and workshops	Diversify programs (seminars and workshops) that are fun and Educational to increase fee-paid attendance.	Fee for Seminars and Workshops	Total Goal of [\$]	

Recruit long term Student Sponsorship	Develop Student Sponsorship Benefit package that outline both short and long term benefits	Matchmaking for the sponsors and their students to have a meaningful relationship and nurture their future employees	10 sponsors for 10 students	
Increase donations to CSI Foundation..	Promote the values of donating to CSI Foundation.	Encourage members' Legacy/Estate Planning by naming scholarship after significant endowments.	Increase donations by 10%	

Strategic Objective: Develop and implement a marketing strategy

Promote CSI "Brand", Membership Value Awareness

Committees: Marketing Committee [?] along with other committees

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
Promote CSIIndy "Brand" through Enhanced Marketing to raise the awareness of CSI Indy Chapter – Telling our story	Promote awareness by communities and industries of CSI Indy Chapter	Promote CSI Indy Chapter as quality professional organization that is family friendly and fun to be a member of..	Over 65% of Indy Chapter members are aware of the new Brand	
	Utilize free Publications – Get in "Building Excellence" and others.	Publish monthly articles in Building Excellence, Newspapers, & other publications	Monthly articles and announcements of Chapter activities	
	Utilize CSI web presence and social media for mass dissemination of CSI information	Timely dissemination of CSI events & announcements thru Chapter website and social medias available	All Announcements are posted and published in a timely manner	
	Develop a video marketing program to tell "Our Story"	Publish the monthly video in timely fashion with specific topics: Member Spotlight, Feature Events & Special topics	Annual evaluation of the outcome of the Video Program.	

Strategic Objective: Improve Communication

Enhance Chapter Communications both Internal and External

Committees: Chapter President to Designate Champions from Various Committees; Programs

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
Improve internal communication between Leadership and members	Maintain & Update member data base and roster	Monthly update Member Roster and available on Chapter website.	Members can easily access and use the roster on line and printout hard copies.	
	Develop efficient and effective Communication materials.	Place information flyers on each table during monthly meetings; mass- e-mailing.		
Improve external communications with outside organizations.	Conduct joint meetings	Joint meetings with: - AIA - IIDA - DBIA - ASHE/ISHE - IFMA Indy - BOMA - USGBC - NAWIC - DHI	3 joint meetings or events per year.	
	Share Calendars with partner organizations	Share calendars with the other organizations and invite them to attend CSI events	Easy access by partner organizations for CSI events.	
	Effective utilization of Chapter website	Educate members on what the website can do for them and how to use it	All members are well versed with navigating CSI website	

	Encourage the participation of Chapter social media	Educate members on what social media are available and how to use.	50% of members are familiar w/ Chapter's social medias.	
Improve Communications with universities and graduate architecture programs				
Improve Communications with the Public Sector				

Strategic Objective: Develop and implement a leadership training program

Increase Committee Participate, Improve Business Meetings & Committee Announcements

Committees: Chapter President

Objectives	Strategies	Implementation Key Action Steps	Evaluation Method/Measurement	Status/Progress
No more "Committees of One"	President to work with Committee Chairs to recruit committee members..	Committee Chairs to build teams for each committee..		
	Publish "Want Ads" on Chapter Website, distribute flyers on tables at Chapter Meetings & in Chapter Monthly newsletters	Clarify each committee's functions and tasks.	Members are aware of the functions of each committee	
Maintain/Improve Leadership, Mentoring & Training.	Refer to Administrative Guide and Educate Committee Chairs on their duties	President to advise all Committee Chairs of the Administrative Guide and their duties	Committee Chairs aware of expectation & the available tools for executing their duties.	By August of each year
	Update Mentoring, training.	Update Mentoring and Training Protocols	All documents are updated and available on Chapter website	
Leverage Great Lakes Region CSI Resources	Distribute link to Education/Program Committee Chairs to make aware of the available GLR resources at GRL level	Designated GLR Liaison to advise appropriate Committee Chairs of GLR resources	Committee Chairs effectively utilize GLR resource for their needs.	

CSI Indianapolis Chapter Strategic Plan

After examining the matrix categorizing action items, it is apparent that action items related to education and membership retention are a high priority. While all the actions included in this plan are essential, it is not practical to set out to achieve these goals in one year. The actions are listed below, with priority given to those mentioned above.

While the actions are not specifically detailed on how to accomplish them, it is up to the current board to work together to decide how to achieve these goals. This is simply a framework.

FY21

- Communicate with Members – Newsletter, Social Media, Website
- Explore relevant programs and education classes
- Encourage new membership
- Continue to develop Certification Class
 - Webinar
- Include CSI Resource/Document information on website
 - Links to Institute, Great Lakes Region

FY22

Continue previous years' items

New in 2022:

- Explore changes in communication
 - Web based meetings
- Encourage industry innovation
- Effort to promote young professional membership
- Effort to promote student chapter involvement
- Encourage coordination with other Industry Organizations

FY23

Continue previous years' items

FY24

Continue previous years' items

FY25

Continue previous years' items

Re-evaluate for next 5 years

Conduct survey of membership