



NEWS AND INFORMATION FOR AND ABOUT CSI CHICAGO MEMBERS DECEMBER 2010

Congratulations to Members Celebrating DECEMBER Anniversaries

30 Mr. Richard L. Levin, LEED AP, FCSI, CCS, *Kahler Slater Architects, Inc.*; **27** Mr. James V. Harbacek, CSI, *Skidmore, Owings & Merrill*; **24** Mr. Albert J. Nickele, CSI, Member Emeritus ; **20** Joseph E. Tomes, CSI, *J.E. Tomes & Associates*; **18** Julie A. Montrose, CSI, CDT ; **13** Mr. Brad Meyer, CSI, *Terrazzo & Marble Supply*; **12** Mr. John B. Weber, CSI, *John B. Weber Architects*; Mr. Bob Schrock, CSI, CCPR, *PPG Industries*; **9** Mr Arnold Germann, CSI, *Maxit, Inc.*; **8** Mr. Dietmar Scheel, PE, CSI, *Montgomery Watson Harza*; **7** Ms. Kristin S. Henriksen, CSI, CDT, ; Mr. Kim R. Clawson, CSI, CDT, *Clawson Consultants*; **5** Dewain Peterson, CSI, CDT, *ASSA ABLOY*; Ms. Katherine B. Tunca, CSI, *The University of Chicago Medical Center*; Mr Howard Jancy, CSI, CDT; **3** Mr. Eric Haskell, CSI-I, *Rulon Company*; **2** Mr. Ron Hughes, CSI, *Moen, Inc.*; **1** Ms. Michelle E. Goodeve, CSI, CDT, *Traco*; Ms. Lise Helene, CSI ; Mr Alex Szatanek, CSI, CDT, *Thornton Tomasetti, Inc.*; Ms. Erin Hatcher, CSI-I, CDT, LEED AP;

Welcome New Members Joining in November

Anthony E Jackson, Sr., CSI, USGBC, *Construction Specialties, Inc.*;
Mr. Carson Craddock, CSI, *The Sherwin-Williams Company*;
Pamela Hutter, CSI, AIA, ALA, *Hutter Architects, Ltd.*
Mr Arnold Germann, CSI, *Maxit, Inc* (9 Year Member – New to the Chicago Chapter

Trivia Night Was a Blast!

Tuesday, November 10 at the Green Door Tavern was a sellout!



Yes, those are CSI balloons you see in this picture. Along with a trivia contest for the Design and Construction Community, there was a physical challenge. How many CSI balloons can you blow up in 45 seconds? Needless to say there was a lot of hot air in the room.

Thank you to Susan Heersema, who stumped many an architect and structural engineer with her incredible questions and was the organizer behind this event. Also thanks to Tabitha Ruiz, CSI Chicago Chapter Social Chair, who helped at the event.



November 16 Chapter Meeting

Even with GreenBuild in town, the CSI chapter meeting was packed with members as well as some distinguished guests. Held at Maggiano's because of the unavailability of the Union League Club, members of the Institute were able to break away from the CSI booth at GreenBuild to attend. Welcome to:

Walt Marlowe, PE, CSI, CAE, Executive Director/CEO CSI Institute
Paul Bertram, Jr., FCSI, CDT, LEED AP President-elect CSI Institute
Casey Robb, FCSI, CCPR, LEED AP, VP CSI Institute

Thank you to our tabletop presenters:

Brad Meyer and Bryan Olson, Terrazzo & Marble
Doug Holmes and Amy Ramer from Door Engineering
Dewain Peterson from Assa Abloy
Karen Swank from Vertical Visions
Steve Demand and Joey Rock from BSD Spec Link

Contract Documents News From The Institute

CSI joined the ConsensusDOCS™ Coalition in Spring 2010 with the goal of promoting CSI principles and best practices for construction documentation and communication. Since that time, a CSI representative has participated in ConsensusDOCS meetings and, with the Technical Committee, has reviewed several documents for adherence to CSI principles. The Board approved a recommendation from the Technical Committee to endorse six ConsensusDOCS as being in general conformance with CSI technical principles:

- 200 – Standard Agreement and General Conditions Between Owner and Constructor (Lump Sum Price)
- 221 – Constructor's Statement of Qualifications for a Specific Project
- 240 – Standard Agreement Between Owner and Design Professional
- 420 – Standard Agreement Between Design-BUILDER and Design Professional
- 703 – Standard Purchase Agreement for Noncommodity Goods by a Contractor
- 750 – Standard Agreement Between Constructor and Subcontractor

CSI also participates with the Engineers Joint Contract Document Committee (EJCDC) and endorses several of their standard contract documents. CSI has also held discussions with the American Institute of Architects and the Design Build Institute of America regarding possible participation in the development of their contract documents.

One more time

By Sheldon Wolfe, RA, FCSI, CCS, CCA

Last year, our annual election ballot included a proposed bylaws amendment that would have combined the professional, industry, and associate membership classifications into a single group. Although the amendment received over sixty percent of the votes, it fell short of the required two-thirds majority required to pass. The Los Angeles chapter brought the issue before the members at the annual meeting in Philadelphia, where eighty percent of the members voted in favor of again putting membership reclassification before the members, as an amendment proposal on the 2011 ballot.

Readers of this column may recall that last year I questioned the need for changing to a single class of voting members. I still feel the same as I did then about some of the issues, but in the last couple of months I learned a few things that led me to the conclusion that the time for a single class of voting members is long overdue.

When the suggestion to change to a single group of voting members was made a year ago, one of the most common complaints was that some members or potential members were or might be offended by the use of the word "professional", believing it could be seen as a reference to the manner in which members acted, or as a suggestion that some members are better than others.

This was somewhat surprising to me, as we work in an industry that relies on the correct use and interpretation of definitions. If you were to ask random people to name a few professions, it's likely they would say doctor, dentist, attorney, teacher, and perhaps architect or engineer. These are occupations that commonly are referred to as professions; they have in common a requirement for several years of formal education, and, usually, government control of the practice. It is highly unlikely that the same question would elicit contractor, mason, or salesperson as a response.

One of the examples given in support of that argument was that teachers or professors felt slighted because, as just noted, they generally are considered professionals. But, just as anyone can have a profession in the general sense, or behave in a professional manner, so, too, can anyone profess to know a great deal about any given subject - and those same professors would probably object to a master mason claiming to be a professor. Given the derivation of the term professional, and the clear way in which it is used, I don't accept the political correctness argument that we should change the name simply to avoid the possibility that someone might be offended.

A bit of background

So what changed my mind? What led me to decide that it's worth changing to a single class of voting members?

At first glance, it might appear that all voting members (associate, industry, and professional) have equal status; all are allowed to vote, and all are allowed to hold any office. There are, however, a few bylaws requirements that remain from our distant past, when CSI was, in essence, an organization of design professionals.

Since I became a member in 1987, I have accepted as fact that all voting members are equal, and, as we often do, I imagined that was the way it's been, if not forever, at least for a long time. And why not? As long as I can remember, CSI has claimed everyone in the construction industry - "Architects, specifiers, contractors, engineers, building owners, facility managers, attorneys, academics, product suppliers, construction software vendors..." - as potential members. Unlike AIA,

AGC, and many other organizations, full rights and privileges are not limited to one type of member. Well, almost. In the beginning, there were only specifiers. In 1948, CSI was formed as an organization for architects and engineers; in other words, for members of the design professions. The bylaws allowed others to join, but those who were not professional members could not vote or hold office. Over the years, as membership grew, the number of members who were not architects or engineers increased. Along the way, the names of member groups changed, so for convenience I'll use the ones we have today, - associate, industry, and professional - and I'll include associate members with industry members. A few of the dates that follow are best guesses based on available information, but most are correct, and at worst a couple are within a year or two.

As the number of industry members grew, so did their influence, and so did their desire for full participation in CSI. Old bylaws not only limited the rights of industry members, but treated them as second-class citizens. If a professional member changed jobs, and no longer qualified for professional membership, the change to industry member was immediate. In contrast, an industry member who changed jobs and became eligible for professional membership had to wait for approval from the Institute Board.

The DC Metropolitan Chapter's history speaks about their 1959 Winter Holiday Program, which was called "Associates Night". The remarkable thing was that nine industry members were allowed ten minutes each to present their products to the professional members - something that was not permitted at chapter meetings. (But I'll bet they were allowed to pay the bar tab!)

It wasn't until 1963 that industry members were represented on the Institute Board, and then only as directors. The first time an industry member was allowed to serve as an Institute officer was 1964, and then only as treasurer. Industry members were allowed to vote, but only for industry directors.

At some time in the 1960s, industry members were allowed to serve on chapter boards, but they could not serve as chapter president. In 1966, industry members became eligible for Fellowship. In the first year they were eligible, five of the eleven Fellows were industry members. Not a bad showing for second-class citizens!

In 1975, nearly thirty years after CSI was formed, Industry members were given the right to vote, and the office of Industry Vice President was added to the Institute Board. Industry members were at last allowed to serve as chapter presidents - but only after review and acceptance by two-thirds of the chapter's board of directors. You just can't trust a salesman!

In 1986, industry members were made eligible to serve as Institute president, and in 1989, CSI elected its first industry member president.

Last year wasn't the first time that an attempt was made to grant industry members full rights; the records I have indicate that changing to a single member category - thereby giving industry members complete equality with professional members - was considered in 1974 and 2002, and other information suggested that it also may have been considered in other years.

We're not done yet!

What we have, then, is a long, slow, and painful journey, gradually removing obstacles to industry participation at various levels of the organization. Even though industry members now are allowed full participation, our bylaws continue to imply that some voting members are better than others.

- To charter a chapter, fifteen members are required, twelve of whom must be professional members, and to maintain a chapter, it must have at least eight professional members. I suspect a chapter that had no professional members might not be as effective as one with similar numbers of industry and professional members, but if they can make it work, why would we stop them?

- To have a quorum at the annual meeting, a majority of the members present must be professional members. If we have 300 industry members at an annual meeting, and only 299 professional members, does that really mean that we don't have enough qualified people to do business?

The bottom line is that industry members remain second-class members. The favoritism is subtle, and most members probably are not aware that it exists. While preferential treatment may have made sense sixty years ago, CSI has changed since then, and it no longer has a place in our organization. It must be especially galling to the many industry members we continually call on to finance all of our activities.

We have been talking about member equality for more than forty years; it's time to make it reality. Separate but not quite equal just doesn't work. When you get your ballot in February, vote in favor of equality.

PER-SPEC-TIVES

OTHER PERSPECTIVES, OPINIONS, EXPRESSIONS, IMPRESSIONS, THOUGHTS AND IDEAS ABOUT THE NOBLE PROFESSION OF SPECIFICATIONS WRITING-- OPEN FOR, AND SEEKING DISCUSSION

DESIGN PHILOSOPHY

by Ralph Liebing, RA, CSI, CDT Cincinnati, OH

Design, in the architectural context, is often mistakenly assumed to be an effort at a purely artistic approach to a project. In essence though, it is at the forefront of the project, the theme—the initial statement. And the effort is to bring all elements of the proposed project into proper focus and context. It is an effort to convert information, wants, needs and desires into the reality of a comprehensive and properly functioning facility for the client.

It is an attempt to incorporate a fixed set of approaches, concepts, rules or procedures, which will henceforth be applied in an inflexible, unwavering manner. The statement of a design philosophy is not an attempt to establish or implement a policy or system regarding project design to every project. Should the specifications writer be part of the team that develops the philosophy for the project?

The statement of design philosophy is mostly a dedication to provide each client with an individualized design solution which best serves the various functions of the client, which provides for new, different, and expanded operations, and which presents a reasonable direction and opportunity for future expansion or re-configuration. Nothing less should be professionally acceptable. Is there a chair at the table for the specifications writer?

However, in addition, the architectural effort has a responsibility for gathering and interpreting information, combining it into a comprehensive and workable solution, and providing a facility for all of the various other systems and functions. This needs to be an effort that is studied, controlled, reasonable, image-enhancing [for the client], and which coordinates the overall project into a complete and cohesive enclosure-- meeting both budget and schedule parameters of the client.

Within this effort, it must be understood that the client has several aspects of the projects available, but usually will not be able to control all of them. Cost and scope are obvious examples of principle items the client is concerned with. So, too, schedule is playing an increasing role in the client's concerns.

In this, one element has an inherent ability to assist the other functions in varying ways. This is quality! While present in every discipline's work, in the overall scheme, the architectural effort is the first to establish which level of quality is attainable given the other considerations. Often what is established in this sequence will have some impact on the others. Therefore there is a need for a fully coordinated effort, on the part of all disciplines, as equal partners, even when not immersed in the project work. The need is for a continual flow and exchange of information, in the level of detail available or needed, so proper and due consideration can be given to the information, systems and other designs.

In summary, the architectural effort has the initial and ongoing responsibility to establish and maintain the direction and cohesiveness of the project, encompassing and accommodating all disciplines, in a form which provides the client with a satisfactory aesthetic as well as functional solution. Several parties may lay claim for the non-existent role of leader of the project, but it is the architect who has the broadest and most involved role. Knowing the project from the get-go, and all the innuendos and side comments included as part of the programming, the architect has a sense of the "flavor" of the project, unlike the others. This leads to a higher sense of need or desire on the owner's part and in turn priorities the features included in the project and their relative importance. Specifications data and input are essential from the start of the project design!

This is simply a matter of fact, and not a grab for prominence or control-- it is the natural extent of the role required by the Architect-Owner service agreement.

The in-depth knowledge of the project that lies solely with the architect creates a point of concern and a need for mutual appreciation in the use of that knowledge. Since no other party has this distinct bundle of data, that architect needs to set out as the sole recourse for certain information. Following the path that architect developed for the concern all participants will work to a uniform as a common goal. We need to remind ourselves of this quite often, when conflict and glitches begin to show up. As specifiers, too often given little regard, we need, continually to express the specifications' input to the philosophy!

A good portion of the construction concept, detailing, selection of material, and information comes from the architect, so it is well to have the sole source within the project "company" where it can disseminated to all others in uniform and timely manner. This is not a matter of status of control but a way to convey the owners' desire, etc. to the construction and field personnel-- it is a matter of clarity, decisiveness and accuracy. You know that-- but do all of your colleagues?

Nov. 2010

Message from CSI President Dennis Hall, FCSI, CCS, CCCA, to CSI's membership

New Ventures in Building Information

The Construction Specifications Institute (CSI) is a technical society dedicated to improving the organization, management, and communication of building information. Among our core values is the development of practice tools, which can be used by design/construction/facility management participants in the creation of high-performance buildings.

“Practice tools” is among the four core values identified in CSI’s Strategic Plan (www.csinet.org/strategicplan) – right next to certification, education and the development of standards and formats. It is also the value that causes the most head-scratching when members first read about it in the strategic plan. What does “practice tools” really mean for CSI?

In achieving the mission of the Institute, CSI is continuously engaging other groups to adopt and incorporate CSI formats and standards into their practice tools and operational practices. We are also actively seeking relationships with firms and organizations that will collaborate with us in the development of new practice tools.

On Nov. 1, that pursuit of the “practice tools” value produced a concrete example for the Institute when CSI announced that it has acquired Building Systems Design (BSD). BSD is a software developer specializing in electronic applications used by the construction industry. Its products include: SpecLink, a master guide specifications system used by design firms to produce project specifications; CostLink, a cost estimating system used by contractors to produce project cost estimates; and PerSpective, a computer application used by facility owners in creating design/build proposals. BSD also produces DocuBuilder, the document management software used for ConsensusDOCS, the standard construction contract document system produced by the ConsensusDOCS Coalition, of which CSI is a member. Finally, BSD is actively involved with building product manufacturers in the collection of data involving the specification of building products. The CSI Board believes that the BSD product range addresses many of the needs of our diverse membership and the integrated project delivery process.

In other words, BSD is a practice tool for CSI that will help propel CSI into new and exciting opportunities, both nationally and internationally, with some of the most forward-thinking organizations in the industry that are working on building information management. It will also provide us with other sources of revenue to support our involvement in industry activities. While our standards and formats are critical documents for the industry, CSI recognizes that in order to be truly relevant in today’s digital society, those standards require incorporation into electronic practice tools. BSD can be an organ for CSI in advocating for MasterFormat, UniFormat, SectionFormat, and OmniClass.

BSD will continue to operate under their current management, as a for profit firm. CSI believes that the acquisition of BSD represents both a good strategic fit and a good long term investment opportunity. Our members will directly benefit from this partnership with discounts on BSD products and services.

This won’t limit the expression of another one of our core values, which is first and foremost in many members’ minds – maintaining an open process for the development and update of MasterFormat and our other formats and standards. For nearly fifty years, CSI has promoted the use of common organizational structures for building information and the education of the industry on project delivery processes. CSI is committed to maintaining and fostering stronger relations with our current strategic alliance partners, who work with us in maintaining our format documents and the other activities and initiatives of the Institute.

CSI is currently engaged in discussions with other external groups regarding possible new practice tools and products. These include both well-established organizations and some relatively young firms, all producing exciting tools designed to assist users in sustainability considerations, building information management, and other subjects of interest to our members and the construction industry. With the goal of both advancing CSI’s mission to improve construction communication and increasing the value this organization offers to you, the individual member, CSI is working hard to be your primary source of knowledge for doing your job and advancing your career.