

The Great Lakes Region of the Construction Specifications Institute

Strategic Plan FY16 – FY20



MAY 2016

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INSTITUTE STRATEGIC PLAN SUMMARY

Reason for a Region Strategic Plan:

Develop a plan by year on how to support CSI Chapters in the Region for current and future Region Leaders

Develop Accountability for the Region 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)

Become a Resource:

Industry involvement

Serving chapters

Technical involvement

Speakers guide

Program Guide

Who is doing what in Chapters

Utilizing additional webinars

Planning Assistance:

Active role in Region conference

Involving Directors

Leadership training

Regional planning guide

Transparency with chapters

GLR 2015 SURVEY SUMMARY

In the fall of 2015, Great Lakes Region members were given a survey to ascertain what the Member/Chapter needs were for CSI and the GL Region – both what was being done right (Strengths) and what was needed (Concerns). Following that survey, the following were the major topics/comments. Interestingly, some of the Strengths were those not realized by the Member until after they joined. Also interesting is that some of the Strengths for some are concerns for others.

| Strengths Not Promoted | Topics of Concern |
|--|---|
| Education/Technical/Programs/Webinars | Communication |
| Networking/Comradery/Friendships | National News |
| Sharing Information | Inter-Chapter news |
| Diversity of Membership/Access to Product Representatives | Industry News |
| Certification/Industry Recognition of CSI Certification | GLR Newsletter |
| Leadership | Best Practices for Chapters |
| Trade Show | Forum for Exchange of Ideas |
| Variation in Chapter Meeting Format | Retaining Membership |
| Training on Industry Standard Documents/Construction Practices | Resource for Challenged Chapters |
| Student Chapters | Region Speaker List |
| Personal Growth | Coordinated efforts with other Industry Organizations |
| | Certification Classes |
| | Specification Writing Support |
| | Product Specification Support |
| | Staying Relevant |
| | CSI BIM Format |
| | CSI WEB Format |
| | Facilitate Innovation |
| | Technical Thinking |
| | Encourage Young Professionals to Join/Attend |
| | Student Chapter Involvement |

THE MATRIX

This matrix as a data tool for looking at those initiatives from previous strategic plan and recent comments from membership through the survey... Each of these initiatives can serve both as a goal and a strategy, where actions are grouped in the intersections. Before reviewing the actions, both the mission and values of the Institute and Region need to be understood.

MISSION

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.

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

PILLARS

The Pillars listed below are from the Institute. The Region should align with these Pillars in order to deliver a consistent message and to be able to further the achievement of development of these Pillars in our Region.

TECHNICAL ADVANCEMENT

Changes to lead us into the next phase of BIM and Gaming Technology. We hold the license for Omni Class, and think as the industry moves to more design-build, systems and modular assembly; Omni Class will become a standard that is marketable and bring in increased revenue.

CERTIFICATION

Make CSI's certifications more visible, valuable. Create improvements by working with Educational Institutions (younger adults) and other organizations to bring CSI's certifications into the predominant choice of building professionals. We also plan to restructure the membership model to share for some of the access and things we give away for free now to the general public. CSI members would have more access to some webinars and education items. CSI Certified Members would have even more access and tools, making our certifications more valuable.

EDUCATION

Use our standards, formats, certification, and technical expertise to create learning and education programs to make CSI the go-to organization for lifetime learning. From Student to Retirement. For example, one of the current projects is an On-Boarding Program for our Corporate Partners to train their new hires with CSI programs and expertise, making them more effective in less time-saving the company money that far exceeds the dollars they spend on their Corporate Partner Membership.

FINANCES

For many years membership funds have driven over 60% of our income. With the decline in our numbers, we need to increase other areas of income to keep financially solvent. These programs need to be developed and grown. In the short term, we also need to reduce the amount of money spent on unnecessary duplication of services.

Integral to achieve and succeed with each of these Pillars are Communication Excellence and Building Team Diversity.

Communications Excellence

CSI communications must differentiate its value to both its members and the construction industry as a whole. CSI will ensure that the role of chapters, regions, and the national organization are maximized in developing and delivering effective communications. This communications theme includes a focus on generating two-way dialogue with members and stakeholders as well as expansion into emerging communications tools and mediums.

Region Newsletter/Monthly Address which includes Institute Director report
Updating Region Website

Building Team Diversity

Collaboration and knowledge sharing across the building team is central to CSI's value proposition. This helps to define CSI's brand and is a critical strategic driver of its success. For maximum impact, CSI's strategic initiatives should leverage the diverse nature of its membership and reinforce its unique role among members of the construction industry.

OBJECTIVES

Similar to the Pillars, the Region must align with the Institute Strategic Plan Objectives.

CSI MEMBER PERSPECTIVE

- Support and strengthen chapters and regions and develop synergy among all levels to harness the energy and innovation within CSI
- Align CSI's resources to key strategic priorities
- Develop technological competencies and infrastructure to fuel effective member communications and growth

CONSTRUCTION INDUSTRY PERSPECTIVE

- Integrate CSI standards and formats into current project delivery practice tools to enable the transfer of building information among all members of the construction industry
- Expand the industry's understanding of the building information community and the roles and importance of its practitioners
- Strengthen educators' understanding of CSI's role and resources
- Expand the scope and relevance of CSI educational programs and certifications to be valuable to all industry members
- Nurture industry alliances and synergies to maximize the visibility and impact of the building information community

ORGANIZATIONAL PERSPECTIVE

- Increase responsiveness and reliability to ensure a valuable and rewarding member experience
- Create collaboration tools and resources to allow for effective knowledge sharing and productive teamwork
- Develop and deliver programs and services to help emerging professionals

FINANCIAL PERSPECTIVE

- Improve the ability to quantify the financial impact of CSI programs and services
- Identify, develop and maximize alternative revenue streams
- Promote CSI channels as the essential "conduit for commerce" in the construction industry

Each action for the Region was categorized with a **Pillar** and an **Objective**. The matrix was developed based on the survey and discussion that occurred at the 2016 Great Lakes Region Conference and the results are illustrated on the following two pages:

| | CSI Member/Chapters Perspective | Construction Industry Perspective | Organizational Perspective |
|--------------------------------------|--|---|--------------------------------------|
| PILLAR 1 TECHNICAL ADVANCEMENT | Specification Writing Support | Staying Relevant/ Staying Current | Facilitate Innovation |
| | Product Specification Writing Support | BIM Format | Encourage Technical Thinking |
| | Forum for Exchange of Ideas | WEB Format | Diversity of Membership |
| | Trade Show | Driving Force for Innovation | |
| | Training in CSI/Industry Documents | Respond to Geographical Industry Similarities (Sharing) | |
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| PILLAR 2 CERTIFICATION | Encouraging Young Professionals to Join/Attend | | Improve Certification Study Material |
| | Provide Certification Classes | | |
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| | CSI Member/Chapters Perspective | Construction Industry Perspective | Organizational Perspective |
|-----------------------|--|-----------------------------------|--|
| PILLAR 3 EDUCATION | CSI Student Chapters | Communicate Innovations | Modify Region Conference |
| | Region Speaker Bureau | Relevant Programs | Region Conference Liaison |
| | Leadership Training | | |
| | Mentoring | | |
| | Operating Guide/ Region Conference Guide | | |
| | Promotion of Academic Programs Educator/Chapter/Student Toolbox | | |
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| PILLAR 4 FINANCES | Retaining Members | Reaching out to Non-Members | Best Practices from Each Chapter |
| | Developing/Improving Other Sources of Income | | Resource for Challenged Chapters Toolbox |
| | Regional Calendar (advertise events) | | Advisory Committee for Challenged Chapters |
| | | | Visit Chapters |
| | | | Membership Best Practice Webinar |
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STRATEGIC PLAN FY16 – FY20

After examining the matrix that categorized the action, it can easily be seen that Communications Excellence and Building Team Diversity from the Organizational Perspective are high priority items. These items must be looked at in conjunction with the items that were voted to be the most important. While all of 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.

FY16

- Communicate with Chapters – Newsletter,
- Resource for Chapters – Website
 - Information from National
 - Information from Chapters in Region
 - Start/Solicit Region Speaker List
- Develop Region Certification Class
 - Webinar?
 - Region Conference Program
- Concerted effort to visit each chapter in the Region
- Include Specification Writing Tips on Website
 - PowerPoint presentation
- Programs
- Develop certification class regional – multiple webinars
- Not just visit but involve Chapters

From Previous Years

- Continue Leadership Training PowerPoint
- Concerted effort to visit each chapter in the Region
- Develop Region Operating Guide
- Develop Award Guide

FY17

Continue previous years' items

New in 2017:

- Explore changes in communication
 - Web based meetings
 - Web based conferences for those that cannot attend personally
- Encourage industry innovation
- Create advisory group for at-risk chapters
- Region wide effort to promote young professional membership
- Region wide effort to promote student chapter involvement at Region Conference
- Encourage coordination with other Industry Organizations
 - Get information to link on website
- Name the Advisory Group for At-Risk Chapters.
 - Include Institute Director.
 - Name at least two of the members from smaller chapters;
 - One from Toledo, who does a nice job of staying active as a small chapter.
 - Name one from BlueGrass or Evansville, as they are struggling and we need their input as to what they have done that DIDN'T work.
- Advance Young Professional Membership
 - Use the efforts of Indy and Columbus as examples of how this can be done.

FY18

Continue previous years' items

New in 2018:

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FY19

Continue previous years' items

New in 2019:

FY19

Continue previous years' items

New in 2020: