



# SPECTICKLE



SAN DIEGO CHAPTER  
The Construction Specifications  
Institute, Inc.

Volume 4, Issue 5  
December 2004



Michael A. Lugo, CSI, CCS, AIA

## President's Message

I don't know what to write about this month although one would think it would be easy, especially with the major winter holidays and celebrations coming up, Chanukah, Christmas, Kwanzaa, New Year, the SDCSI party on December 2<sup>nd</sup>, my office's party, your office party. A wonderful season to spend good times with family, friends and colleagues. Actually, I'm writing this even before Thanksgiving has happened, so I also have that to look forward to. Kids and grandkids are coming. Spoiled rotten.

I just realized that all of these are celebrations, not just memorials, like July 4<sup>th</sup>, or Memorial Day, Veterans Day. So, what would I like to raise in celebration? In case you haven't noticed, it's easier for me to write about my feelings and thoughts, than to preach about what *you* should do, although I do that, too, sometimes.

"Celebrate, celebrate, dance to the music." ... some words from one of my favorite hymns.

Celebrate that we are able to dance with whatever or whomever we accept as our "Lord of The Dance," in the face of an enormous amount of strife and turmoil and suffering and the unnecessary premature deaths going on in the world. Pray that as we are able to celebrate our good fortune, we can work to give others the same opportunities that we have had, to take control of their lives and to live in peace.

Well, that was a little preachy, wasn't it?

Back to CSI stuff. Read the rest of the newsletter.

*Michael A. Lugo, CSI, CCS, AIA*

The San Diego Chapter's mailing address has changed. Please be sure to make permanent note of it ...

**The San Diego Chapter of  
The Construction Specifications  
Institute, Inc.  
P.O. Box 191307  
San Diego, CA 92159-1307**

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### "INSERTS":

- Construction Products Faire VENDOR INVITATION
- Construction Products Faire ATTENDEE INVITATION
- SDCSI Board Meeting Minutes: September 2004
- West Region Minutes: 09/30/04 Board Meeting; Notes from 10/1/04 Annual Members Meeting

Did you know? ...

**All CSI Chapter meetings  
qualify for 1 ½ hours  
of AIA Continuing  
Education credit.**

*AIA members should self-report  
this time to AIA to receive credit.*



# Calendar of Events

## ◆ THURSDAY, DECEMBER 2<sup>nd</sup> 2004 — ANNUAL HOLIDAY PARTY

**LOCATION:** The Alhambra Room at The Prado, Balboa Park, San Diego

**SCHEDULE:** 6:00-7:00 PM No-Host Social Hour

7:00-8:00 PM Dinner

8:00-10:00 PM Raffle & Dancing to music by Bill Calhoun

**COST:** \$45.00 per person

## MARK YOUR CALENDAR for these COMING ATTRACTIONS ...

◆ **TUESDAY, JANUARY 25<sup>th</sup> 2005**  
First class of the 9-week CDT Study Course

◆ **THURSDAY, JANUARY 27<sup>th</sup> 2005**  
General Membership meeting  
**PROGRAM: 2004 MASTERFORMAT**

◆ **THURSDAY, FEBRUARY 24<sup>th</sup> 2005**  
General Membership meeting  
**PROGRAM: SECURITY HARDWARE /  
ACCESS CONTROLS**

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## Meet Your Chapter Directors ... DIRECTOR—Professional



**H**i, my name is Eric Soldau and I am a new director at SDCSI. I joined the membership a couple of years ago after attending some interesting tours and discussions. I have always been impressed with the high caliber of people throughout the organization. The opportunity to work, learn and network with knowledgeable people makes CSI a rewarding affiliation.

A native San Diegan, I received my BArch at Cal Poly, San Luis Obispo in 1991 and began working for a forensic architect in Mission Valley. The following year found me in Munich, Germany, where I was exposed to very different ways of doing things. I worked in a medium-sized architectural firm which developed projects in Leipzig. I feel that this year was a huge growing experience for me, giving me a new perspective and appreciation for the differences between American and other cultures. I always encourage people to live abroad while they are young and curious about the world.

## 50<sup>th</sup> Anniversary Kudos: UNSUNG HEROES

**T**he next time you see Henry Waterproofing Products, just remember Henry and Judy Holleran. It was a vivacious Judy, Regional Manager at Henry Company, who crushed the grapes, fermented and furnished the wine for our 50th Anniversary gala. We toast you, Judy, for obtaining this donation which was thoroughly enjoyed by everyone.

Also, working hard behind the scenes were two past Presidents, ensuring that our 50th Anniversary was properly celebrated. A profound Joe Franger researched our files and wrote a chronology of events for the past 50 years. He carefully listed our past Presidents and San Diego members who were elevated to "Fellow."

Then, there's legendary Tony Kam who already works a 24/7 schedule. Tony and his son worked many hours creating colors, graphics and signs for the convention. Taking Joe's data, they designed and published our Golden 50th Anniversary booklet.

Meanwhile, resourceful Greg Mowat spent a weekend in his storage shed (not a 'bed and breakfast') going through volumes of scrapbooks and literature to obtain photos of our Fellows. ■

## Eric Soldau, CSI, AIA

After returning to America, I started graduate school in Chicago. I received my MArch from Illinois Institute of Technology two years later and began to work at Skidmore Owings and Merrill's Chicago office. While there, I worked on very large projects located in China and Korea. I was definitely a very small fish in a big lake at SOM, but I developed a sense of what the corporate world is like. After a downsizing event, I was laid off. So I now knew what that was like. I took all of this good experience with me back to San Diego and earned my architects license. In May of 1998, I started working for Architects Mosher Drew Watson Ferguson, a firm started in La Jolla in 1949. We practice mostly educational architecture with some public and military work as well. My favorite thing about working at MDWF is being exposed to a wide variety of building types, each with unique programming challenges. Every project is so different from the next.

Last summer I married my wife Audrey, an interior designer. She has a 12-year-old daughter and we own a house in Point Loma. Besides specifying, I love to sail and play tennis. As a relative newcomer, I look forward to getting to know more of the local members and helping out the Board in my Directorship role. ■

## WE WERE PLANNING OUR 50<sup>th</sup> ANNIVERSARY

**T**he Chapter wishes to thank Art Matsuura for his generous donation to our 50th Anniversary. Art was one of our early members who joined and helped us establish this successful organization.

We applied Art's gift to our Anniversary booklet which Joe Franger and Tony Kam co-authored. Thanks, Art, you have always been a strong backer of CSI.

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## West Region Corner

By Paulette Salisbury, CSI, CDT—WR Director, Industry

Edmund C. Buch, CSI, CCS, AIA—WR Director, Professional



Seems early to say "Happy Holidays" but those special days are nearly upon us. That also means that nearly half of the year is over and only a few more months are available to complete our goals. I hope everyone went home from the Conference with new enthusiasm for their CSI projects. Getting together with friends and colleagues is one of my favorite reasons for being active in CSI.

And sometimes, when I'm with my pals, I get caught up in the energy and take on projects just because it will be an opportunity to be with one of my friends. Maybe you have the same excuse for joining a committee or task team, just so you can be with great people and have some fun while advancing the goal.

I had that experience recently when Sheryl Dodd-Hansen, FCSI, CCS, and I traveled to Reno to visit with our friends there and present Charlie Grundy, CSI, CCS, with his crystal Director's Award. We made the journey by rail as I had train-ride-deficit- syndrome, and it gave us a chance to enjoy the beauty of the Sierras and see some snow and autumn foliage. (Don't worry; this is the only reference to the railroad that I'll make in this column this month.) Check out the website for a photo of Charlie as he proudly receives his award and other pictures in the Gallery.

I am very pleased to let you know that our membership numbers are growing! Thanks to outstanding members Barbara Richardson, FCSI; Mark D. Curtis, RA, CSI, CDT, CPM; Carolyn Stephens, CSI; Bryan J. Varner, CSI, CCCA; Emily Borland, CSI, CCCA; Mike J. Rice, CSI, CD; Jo Drummond, FCSI, CCS; and Edmund C. Buch, CSI, CCS, AIA, who have sponsored one new member and Gina Adams, CSI, CDT, sponsor of three new members. The West Region now has 11 new members since the start of the Member Sponsor-a-Member Campaign.

You may have recently received the Convention and CSI Show registration reminder. Be sure to check the early registration discount date. It is January 14, 2005! So make your reservations early to get the best discount. Hopefully the West will be well represented at the Convention which will be followed by CSI-U, both in Chicago. Here is your opportunity to get professional technical education and the finest leadership development training in ONE TRIP!

Many Chapters have established travel budgets to send their best and brightest leaders and potential leaders to these events. Besides the formal education sessions, the strengthening of friendships and bonding between members is among the most valuable experiences our organization can offer. But you probably know that. You have become one of those members who has caught the CSI spirit. Now, encourage someone else to participate. Financial support of new members to attend Region Conferences and Institute Conventions is a proven method to assure future involvement. Make the commitment to your future leaders, and they will be honored that you recognized their leadership potential and will return the investment ten-fold.



Each one of us should make sure that the companies we rely on for excellence in construction materials is an exhibitor at the CSI Show. Exhibitor registration materials can be obtained at [www.csinet.org](http://www.csinet.org). There will be thousands of qualified contacts attending the Show where exhibitors will demonstrate their familiarity with MasterFormat 2004 and how their products fit into this industry standard. You know what they used to say, "Be there or be square."

So, on that note of encouragement, I wish you peaceful and blessed holidays! ■

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**Institute Board of Directors**

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## CSI's Contract Administration Academy Teaches Skills for Contracts, Communication and Courts

- CSI's Contract Administration Academy takes places January 27-28, 2005, in Tampa, Florida.
- The program targets professionals who execute contract documents.
- Topics include: Project delivery, construction documents, controlling costs and schedules, networking, how courts interpret specs, claims, disputes, LEED™, temporary facilities, submittals and warranties.
- Registration, limited to about 150 people, is now open at [www.csinet.org/caacademy](http://www.csinet.org/caacademy).

In an increasingly complex construction environment, professionals need a reality-based understanding of each participant's role in a project and detailed knowledge of construction documents. These topics often aren't taught during the formal training of architects and engineers, but they are key elements of The Construction Specifications Institute's Contract Administration Academy (CAA).

The CAA will be held January 27-28, 2005, in Tampa, Florida. Registration, limited to about 150 attendees, is now open at [www.csinet.org/caacademy](http://www.csinet.org/caacademy). For those who register by December 20th, the cost is \$415 for CSI members and \$515 for others. After December 20th, registration is \$545 for CSI members and \$645 for others. Group discounts are available.

The CAA covers issues relevant to both specifications and contract administration in two intensive days of education. Experienced instructors will guide participants through discussions and hands-on and written exercises that help participants improve their skill at coordinating projects with clients and consultants. Participants will grasp the roles of each construction team member and improve communication among them. Better communication can improve project delivery, prevent cost overruns, and avert disputes that delay completion and lead to lawsuits.

Commercial construction is changing fast, making continuing education essential to staying competitive. The Contract Administration Academy helps professionals understand the construction process, construction specifications, and the roles and expectations of key project team members. Participants will learn new ideas and solutions, network with others in their field, and earn Continuing Education Units (CEUs) and AIA Learning Unit Hours (LU Hours).

The following sessions will be offered at the CAA:

### Thursday, January 27, 2005:

- "The Critical Role of the Contract Administrator"
- "Get Started Before Breaking Ground: Preconstruction Activities"
- "Submittals & Warranties"
- "Site Visits: Assessing the Work"
- "It's Hard Being Green: LEED™ & Temporary Facilities in Contract Administration"
- "Beyond the Hard Hat: Job Site Safety"
- "Moving the Project Forward: Meetings & Conferences"
- "Substitutions: Best Practices"

### Friday, January 28, 2005:

- "How the Courts Interpret Specs"
- "Contract Document Modifications"
- "Contract Administration from an Owner's Perspective"
- "Applications for Payment"
- "Keeping the Project on Schedule: Time & Delays"
- "Essential Issues in Quality Control"
- "Claims & Disputes: Preventative Measures"
- "Project Close Out"

The CAA's instructors include:

**Charles D. Coleman, CSI, AIA, NCARB** – Currently with The Howard Hughes Corporation, an affiliate of The Rouse Company in Las Vegas, Nevada, Coleman has been responsible for the design, development and construction of the company's portfolio of class A high-rise office buildings and restaurant real estate at Hughes Center. He is a licensed architect and an active member of AIA, NCARB, ICBO, NAIOP and CSI.

(cont'd on page 6)



## CSI's Contract Administration Academy ... continued from page 5

**Douglas C. Hartman, FAIA, FCSI, CCS, CCCA, SCIP** – An independent specifications and construction administration consultant with INSPEC Inc. of Dallas, Texas, Hartman is certified by CSI as a specifications consultant and construction contract administrator. He teaches construction contract administration at the chapter and Institute levels.

**Gerald I. Katz, Esq., Partner, Katz & Stone, L.L.P.** – Katz is a partner in a specialty construction law firm based in the Washington, D.C. area. In addition to his practice, he frequently lectures on such topics as construction risk management, negotiating construction contracts, construction claims and claims prevention, liability of the design professional, and construction insurance.

**Gregory J. Markling, FCSI, CCS, CCCA, AIA, LEED-AP** – Markling is a partner with MOA Architectural Partnership in Denver, and has more than 27 years of experience as a practicing architect and specification writer. Markling has worked on the design and development of a variety of projects, including public and private education facilities, commercial office facilities, light industrial facilities, aviation facilities, long-term care facilities, and elderly residential care facilities. He is a Fellow of CSI and certified by the Institute as a construction specifier and construction contract administrator. He is also a LEED Accredited Professional. Markling is a popular speaker who has presented a variety of specification and construction topics in recent years.

**Paul Simonsen, FCSI, RA, CCS, CCCA, LEED-AP** – Simonsen is the owner of Technical Resources Consultants Inc., an architectural specifications consulting firm. In addition to more than 25 years' experience in architectural specifications, quality assurance and construction contract administration, Simonsen is a registered architect, a Fellow of CSI, a certified construction specifier, and a certified construction contract administrator.

**Salvatore B. Verrastro, FCSI, CCS, CCCA, AIA, NCARB** – Verrastro works for Spillman Farmer Architects in Allentown, Pennsylvania. He has chaired the Institute Specifications Competition Committee as well as chapter, region, and Institute education committees. He has also supported construction education as an adjunct professor at Northampton Community College.

For more information or to register for the Contract Administration Academy, go to [www.csinet.org/caacademy](http://www.csinet.org/caacademy) or contact CSI Member Services at [csi@csinet.org](mailto:csi@csinet.org) or 800-689-2900. ■



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~ Salvador Garcia Jr., CSI, CCS

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# 36<sup>th</sup> ANNUAL CONSTRUCTION PRODUCTS FAIRE WEDNESDAY, FEBRUARY 23<sup>rd</sup> 2005 – 3:00-8:00pm DEL MAR FAIRGROUNDS – MISSION TOWER ROOM

The San Diego Chapters of the CONSTRUCTION SPECIFICATIONS INSTITUTE (CSI) and the AMERICAN INSTITUTE OF ARCHITECTS (AIA) will present the 36<sup>th</sup> ANNUAL CSI/AIA CONSTRUCTION PRODUCTS FAIRE at the Del Mar Fairgrounds. For the fifth year, these two organizations are joining forces to present the largest construction products trade show in San Diego.

Three seminars\* are being offered:

- 1:00-3:45pm **GETTING LAID:** Select, Spec and Install Flooring—Carl Demas, CSI, and other experts in the field  
*Update your files for specifying specialty stone, stained concrete, wood, carpeting and ceramic tile. New adhesives and installation methods make this seminar a must.*
- 2:00-5:00pm **GREEN:** Spec, Buy, Build—presented by an Expert Panel  
*Hear from three local professionals and how they are already constructing sustainable buildings with the state and local government implementing "green" buildings. You need this information to stay on top of the expanding technology.*
- 4:00-6:00pm **ARCHITECTS:** IDP and Acing the Orals—  
*As a future Architect, this seminar is important. Learn what IDP is all about; then hear an Architect present valuable information for passing the orals to become an Architect.*

**\* All seminars carry continuing education credits.**

The cost for each seminar is \$70.00 for CSI San Diego Chapter members and \$90.00–non-members.

The CSI/AIA PRODUCTS FAIRE is the only construction product show done in San Diego that is geared exclusively to the design and construction industry. Architects, Engineers, Designers, Owners, Builders, Developers, General Contractors and Subcontractors will find a wealth of knowledge and resource information available at this ONE-DAY show.

The Show at Del Mar was a great success in 2003, and we hope to add more booths this year. Hot and cold hors d'oeuvres and a no-host bar will be available for your eating and drinking pleasure while you mingle through the latest products and technology. The Faire will be held from 3:00pm to 8:00pm on Wednesday, February 23<sup>rd</sup> 2005. So mark your calendars and we'll see you there!

All attendees may enter the free drawing for a \$1,000 Costco Gift Card. *Need not be present to win!* ■

Barbara Patterson Dennis Coates John Steinbacher	Debbie Hoffman Teresa C. Marlay Jay Haase
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## Using *MasterFormat's* 2004 Edition Could Cut Building Costs 5 to 10 Percent While Reducing Changes and Delays During Construction

Using the 2004 edition of *MasterFormat*<sup>™</sup> to develop commercial/institutional structures' construction specifications could result in an estimated 5- to 10-percent savings in construction costs, according to the Construction Specifications Institute (CSI).

*MasterFormat*, a product of CSI and Construction Specifications Canada, is the organizational standard for specifications, the written instructions for construction, and other information for most commercial and institutional building projects in the U.S. and Canada. The complete 2004 edition, the most significant rewrite in *MasterFormat's* 40-year history, is due for release in November.

*MasterFormat's* 2004 edition can cut construction costs because its much expanded content fosters fuller and more accurate specifications, which can reduce costly changes or delays in projects due to incomplete, misplaced, or missing information. For example, the new edition provides for better specifications about modern buildings' data, communications, and automation systems.

CSI member Tom Rauscher, a Rochester, New York, communications, life safety, and automation systems consultant, estimates an average 5- to 10-percent savings in construction costs when such systems are addressed fully in a building's specifications. "When it's coordinated [during the design phase] between consultants, it's a relatively minor problem to deal with. But when the building's already under construction, it's much harder to resolve," he said.

Data in commercial construction project manuals about voice, data, and video networks has often been deficient, misplaced, or left out because of the limited capacity of *MasterFormat's* previous version, the nine-year-old 1995 edition. Its formatting structure doesn't have enough locations for specifications in a construction project manual to address the tremendous growth in the volume and complexity of information about such fast-advancing systems. Specifications writers have tried to make do by placing data in project manuals where they could, using their individual judgment about locations, if they could be found at all. Many people have added non-standard slots for missing information, without reference to the *MasterFormat* standard.

According to Rauscher, the resulting changes and delays during construction have driven up the cost of building voice, data, and video systems as much as 50 percent, and thereby have added 5 to 10 percent to facilities' overall construction costs. Changes and delays have taken such forms as:

- Tearing down walls to install cabling and/or cable pathways and then rebuilding the walls.
- Adding closets or rooms not in the building's plans to house switches, servers, and other components for such systems.
- Expanding the heating, ventilating, and air-conditioning system to handle the heat generated by such systems.
- Paying for express delivery of large amounts of construction products, such as wire and cable, to minimize schedule delays.
- Paying crews overtime to install such systems to help keep the overall project on schedule.
- Using higher-interest money, such as via a line of credit, to pay for such systems because they had to be addressed as a change order during construction. Lower-interest money, via the building's mortgage, can be used for such systems when they are covered fully in the project manual's specifications, developed during the design phase.
- Paying additional money to install voice, data, or video systems after the building has been built.

The added costs for such systems, which the building owner either absorbs or passes on to his/her customers, can be even greater for technology-rich facilities such as hospitals and hospitality and entertainment facilities. Such buildings have elaborate systems for intercom, paging, closed-circuit television, nurse call, public address/audio applications, and others.

"*MasterFormat's* expanded 2004 edition reflects the fact that the 'wiring' of today's commercial and institutional buildings is about data and communications transmissions as much as it is about power delivery. That reality must be fully addressed during the design phase of a construction project through the specifications. It will lead to more cost-efficient and smoother project delivery, as well as facilitate future maintenance and accommodation of new technologies over the life of the project, all reasons why the building design and construction process will take a giant step forward when the industry transitions to this new edition," said CSI Executive Director Karl Borgstrom, Ph.D.

Functioning as the "Dewey Decimal System" for organizing construction information, *MasterFormat* is divided into divisions, and each division is composed of sections. The 2004 edition has additional divisions and many more sections. That includes the following new divisions concerning communications and other information delivery systems for buildings:

- Division 27 – Communications
- Division 25 – Integrated Automation and Control
- Division 28 - Electronic Safety and Security

The new edition's added divisions and sections also enable specifications to better address building owners' evolving construction priorities such as security, life safety, and environmentally responsible facilities.

Another new feature of *MasterFormat's* 2004 edition is divisions and sections for standardizing specifications for heavy civil construction, such as dams and bridges, and process engineering construction projects, such as power plants and refineries.

The section numbers and their titles of *MasterFormat* 2004 are downloadable at no charge from CSI's website at [www.csinet.org/masterformat](http://www.csinet.org/masterformat). ■

# Thanks for the Memories

November 11, 2004

Dear Ingrid & Fellow SDCSI Chapter Members,

I want to thank each of you for all the kindness extended to me over the past years. You were a very special group to Jack and I am so grateful to have been a recipient of that friendship after his death. I also thank you for the faith you had in me as your treasurer. I never took the task less than a serious trust and hope you feel that I served the chapter honestly.

I want to thank you so very much for the plate with your memories written on it. It will have a good home and I will use it with pride and remember each of you when I use it.

My address for now is 902 Lisa Lane, Erid, OK 73703.

When I get settled into my new house, I will send you that address and hope some of you will stop in for a visit to let me know what is going on in the construction industry here in San Diego and to catch up on golden friends.

Thanks for all the memories.

Phyllis (Moshier)



## For all the right

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**Your clients, colleagues & employer will  
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LOOK at your credentials !**

*CSI Certification is a benchmark of technical knowledge. Professionals who have it achieve industry recognition and increase the value of their work to their clients and their employers. Stand out and be recognized. CSI Certification sets you apart.*

Are you interested in the Construction Documents Technology Program for the

**CDT Exam ?**

Knowledge for Creating  
and Sustaining  
the Built Environment

Do you need

**Continuing Education Credit**

for your Professional License ?

**Tuesday Nights from 6-9 PM**

The CDT Study Course and Exam provide an understanding of the documents used during the entire construction process and are valuable for anyone involved in the construction industry. This class will:

- ▶ Address the overall process of delivering construction projects
- ▶ Encompass everyone involved in delivering projects (i.e., A/E's, specifiers, contractors, suppliers, and owners)
- ▶ Focus on the project documents

**Beginning on Tuesday, January 25, 2005**, the San Diego Chapter of The Construction Specifications Institute, Inc. will again offer a CDT 9-week study course for anyone interested in studying for the exam or in earning professional continuing education credit. **Classes will begin at RCP Block & Brick, 8240 Broadway, Lemon Grove, and will move to NTD and SGPA for some classes. The cost of the course is \$200.00 and includes registration fees and the cost of the required text. The CDT exam registration fee is additional.**

If interested, you can register by calling the toll-free Chapter Hotline at 877.401.6733 and leaving a message stating that you wish to sign up for the CDT class. **You will need to pay the \$200.00 registration fee at the first class, which is, again, Tuesday, January 25<sup>th</sup>. Checks should be made payable to "San Diego CSI."**

As always, the course will be taught by local construction professionals and is based upon Institute's recommended study material.

*If you have any questions about the course, please contact Gina Adams at 619.460.7250.*



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FAX: 626/357-4268  
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Member News

**New Member to the Chapter:**

Kevin D. Milgrim, CSI

**Certification Pass List:**

Matthew C. Boomhower, CSI, **CCCA**—  
*Mbr since 10/93*

John P. Diehl, CSI, **CDT**—*Mbr since 04/96*

Neal Drell, CSI, **CDT**—*Mbr since 07/02*

Dennis R. Hall, CSI, **CDT**—*Mbr since 10/02*

Ronald H. Jones, CSI, **CDT**—*Mbr since 07/03*

**Renewed Members:**

Paul K. Ericson, PE, CSI—*Mbr since 08/94*

Linus G. Harth, CSI, **CDT**—*Mbr since 11/99*

Michael A. Lugo, CSI, **CCS, AIA**—  
*Mbr since 10/97*

Corey Rainbolt, CSI, **CDT**—*Mbr since 10/02*

Robert Rodriguez, CSI, **AIA**—*Mbr since 10/94*

Keith R. Thomas, CSI—*Mbr since 10/03*

Jay R. Whisenant, CSI, **CCS, AIA**—*Mbr since 12/77*

Russell J. Whitaker, CSI—*Mbr since 11/00*

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**EDITORIAL POLICY**

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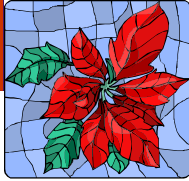
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SAN DIEGO CHAPTER  
The Construction Specifications Institute, Inc.



# Annual Holiday Party

Thursday, December 2<sup>nd</sup> 2004

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¼ page: \$450 for 6 issues  
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CONTACT *Margy Ashby* for additional information.

DEADLINE FOR INPUT: **15<sup>TH</sup> OF THE MONTH FOR THE  
FOLLOWING MONTH'S ISSUE**

## San Diego Chapter CSI 3- to 5-YEAR PLANNING HORIZON

### Mission Statement

(Adapted from National's)

SDCSI advances the process of creating and sustaining the built environment for the benefit of the construction community by using the diversity of its members to enhance knowledge.

### "The Diversity Goal"

SDCSI will promote growth and diversity of its membership to include all participants in the process of creating and sustaining the built environment.

### "The Gateway Goal"

SDCSI will be recognized locally as the premiere resource for locating information needed for the process of creating and sustaining the built environment.

### "The Education Goal"

SDCSI will be recognized locally as the premiere resource for education and mentoring opportunities regarding the process of creating and sustaining the built environment.



THE SAN DIEGO CHAPTERS OF  
THE CONSTRUCTION SPECIFICATIONS INSTITUTE &  
THE AMERICAN INSTITUTE OF ARCHITECTS



Knowledge for Creating  
and Sustaining  
the Built Environment

V E N D O R I N V I T A T I O N

CONSTRUCTION PRODUCTS FAIRE AT DEL MAR

-----co-sponsored by CSI and AIA-----

WEDNESDAY, FEBRUARY 23, 2005

3:00 PM – 8:00 PM

Set-up: 12-3 PM Tear-down: 8-10 PM

Mission Tower Room, Del Mar Fairgrounds (enter Solana Gate)

Because of the great turnout in the past and responses we've received from vendors, we are again holding this year's Faire at the Del Mar Fairgrounds.

WHY BE AN EXHIBITOR AT THIS YEAR'S  
CONSTRUCTION PRODUCTS FAIRE?

Admission is **FREE** for our guests from the following organizations:

AIA • SARA • ASPE • SEAOC • CELSOC • ASCE  
ASLA • SAME • NAWIC • ICRI • SDREO • USGBC

Guests can enter in a **FREE DRAWING** for a \$1,000 Costco Gift Card.

Additionally, guests will have the opportunity to attend the following 3 educational seminars which carry **Continuing Education credit** ... an added draw:

1:00-3:45 PM ... GETTING LAID: Select, Spec and Install Flooring  
2:00-5:00 PM ... GREEN: Spec, Buy, Build  
4:00-6:00 PM ... ARCHITECTS: IDP and Acing the Orals

**Complimentary** Hot and Cold Hors d'Oeuvres will be served during the Faire, and a **No-Host Bar** will be available.



Want to have the **BIG DRAW** for architects to your tabletop?

Ordering **ADDITIONAL FOOD ITEMS** can be arranged directly with Del Mar by calling Andy Sheldon (858.755.6345) to obtain a menu and pricing.



QUESTIONS: CSI HOTLINE 877.401.6733



Facility is accessible to persons with disabilities.

VENDOR TABLETOP REGISTRATION

Complete form below and fax to 619.593.9989 or mail to address shown below.

\_\_\_\_\_ ONE 8 FT TABLETOP (90 available—FC/FS) NAME: \_\_\_\_\_  
 + ONE CHAIR = \$350<sup>00</sup> COMPANY: \_\_\_\_\_  
 \_\_\_\_\_ ONE ADD'L PERSON = \$25<sup>00</sup> ADDRESS: \_\_\_\_\_  
 (Vendors are limited to 1 add'l person; max. 2 per tabletop.) CSZ: \_\_\_\_\_  
 \$\_\_\_\_\_ TOTAL ENCLOSED PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_  
 \_\_\_\_\_ EMAIL: \_\_\_\_\_  
 \_\_\_\_\_ CREDIT CARD # \_\_\_\_\_  
 (MasterCard or Visa Only) Expiration Date: \_\_\_\_\_  
 \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

**ELECTRICITY:** Please use the Electrical Order Form (attached) to order & pay for your electrical needs.

**OR MAKE CHECKS PAYABLE TO: CSI San Diego**  
Mail to: 127 N. Westwind Dr, El Cajon, CA 92020-2955

Refund Policy: 50% by 01/03/05; 10% by 01/30/05

**ELECTRICAL ORDER FORM**  
MAIL OR FAX TO



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COMPANY NAME:	BOOTH NO:
EVENT	
FACILITY	
DATES	
EVENT NO:	

**ELECTRICAL OUTLETS Approximately 120V A.C. 60 Cycle -PRICES ARE FOR ENTIRE EVENT.**

	QUANTITY (For Show Hours Only)	QUANTITY (For 24 hrs/day- Double Price)	ADVANCE PAYMENT PRICE	PRICE AFTER DEADLINE	COST
<b>120 VOLTS</b>					
0-500 WATTS (5 AMPS)	_____	_____	72.00	109.00	_____
500-1000 WATTS (10 AMPS)	_____	_____	124.00	187.00	_____
1001-1500 WATTS (15 AMPS)	_____	_____	145.00	217.00	_____
1501-2000 WATTS (20 AMPS)	_____	_____	167.00	250.00	_____
<b>208 VOLTS SINGLE PHASE</b>					
10 AMPS	_____	_____	220.00	330.00	_____
15 AMPS	_____	_____	251.00	378.00	_____
20 AMPS	_____	_____	314.00	471.00	_____
30 AMPS	_____	_____	377.00	566.00	_____
60 AMPS	_____	_____	495.00	742.00	_____
100 AMPS	_____	_____	651.00	976.00	_____
<b>208 VOLTS THREE PHASE</b>					
10 AMPS	_____	_____	292.00	438.00	_____
15 AMPS	_____	_____	335.00	503.00	_____
20 AMPS	_____	_____	420.00	630.00	_____
30 AMPS	_____	_____	502.00	754.00	_____
60 AMPS	_____	_____	658.00	988.00	_____
100 AMPS	_____	_____	866.00	1300.00	_____

**TRANSFORMER TO BOOST 208v up to approx. 230v - \$3.00/AMP - 20 AMP MINIMUM**

**LIGHTING EQUIPMENT (Including Current Consumed) (Provide Drawing Showing Light Location)**

150 WATT FLOOD LIGHT	_____	_____	86.00	130.00	_____
150 WATT DBL. FLOOD LIGHT	_____	_____	130.00	196.00	_____
100 WATT ARM LIGHT	_____	_____	104.00	157.00	_____
300 WATT FLOOD LIGHT	_____	_____	108.00	163.00	_____
300 WATT QUARTZ LIGHT	_____	_____	130.00	196.00	_____
1000 WATT QUARTZ LIGHT*	_____	_____	214.00	322.00	_____

\*(Time and Material will apply when lift is required to mount overhead)  
All Lights, excluding the 1000 watt quartz light, are for inline booths only.

**MATERIAL (Electricity Not Included)**

EXTENSION CORD 15' & 25'	_____	_____	21.00	_____	_____
MULTI-OUTLET STRIP	_____	_____	21.00	_____	_____

**LABOR (See Rates Listed to the Right)**

**PLACE YOUR TOTAL PAYMENT HERE (Do not fill in Totals Below)**

\* ALL FOREIGN CHECKS MUST BE DRAWN ON U.S. BANKS

**FOR ADVANCE PAYMENT PRICE**

to apply, we must receive your order, payment and a floor plan showing main power location and distribution points (see item #1 on reverse) prior to this

**DEADLINE DATE:**

**AVOID DUPLICATION!!**

If you fax this form with credit card info, do not mail the original form or send another form of payment.

**ON LINE ORDERING**

This show may be available on line. Visit [www.edlen.com](http://www.edlen.com). Use the event # above as your password.

**QUESTIONS? Visit our Web Site.**

**SEE REVERSE FOR ADDITIONAL TERMS AND CONDITIONS**

**ISLAND BOOTHS**

There is a minimum labor charge of (1) hour to deliver power to all island booths. All additional distribution is done by Edlen electricians on a time & material basis.

**208V & HIGHER VOLTAGES**

There is a minimum labor charge of (1) hour for installation & (1/2) hour for removal of all high voltage services. Material charges may apply. If you require services not listed on this form, please call for a quote.

**DEDICATED OUTLETS**

Dedicated outlets require a 20 amp outlet

**24 HOUR SERVICES**

Electricity will be turned on within 30 minutes of show opening and off within 30 minutes of show closing, show days only. If you require power at any other time, order 24 hour service at double the outlet rate.

**LABOR RATES**

ST = Mon-Fri 8:00 am - 4:30 pm 76.00  
(Except Holidays)  
OT = Mon-Fri 4:30 pm - 8:00 am 152.00  
(All day Sat/Sun/Holidays)

COMPANY NAME:	PHONE:	FAX:
ADDRESS:	E-MAIL:	
CITY:	STATE:	ZIP:
SIGNATURE:	PRINT NAME:	
PAID BY CK <input type="checkbox"/>	VISA MC AMEX DINERS DISC	CARD #: _____
CARDHOLDER SIGN:		EXP DATE: _____
PRINT NAME		

<b>FOR OFFICE USE ONLY</b>	OUTLET/EQUIPMENT	\$ _____	DATE RECEIVED	_____	_____	_____
	MATERIAL	\$ _____	METHOD OF PMT.	_____	_____	_____
	LABOR	\$ _____	AMOUNT RECEIVED	_____	_____	_____
	GRAND TOTAL	\$ _____	RECEIPTED BY:	_____	_____	_____
	BALANCE DUE	\$ _____				

## VERY IMPORTANT TERMS AND CONDITIONS

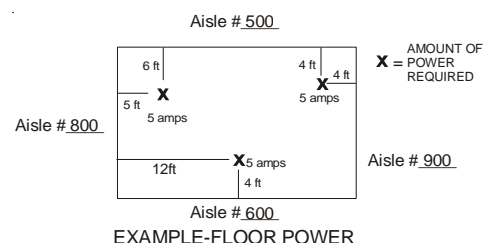
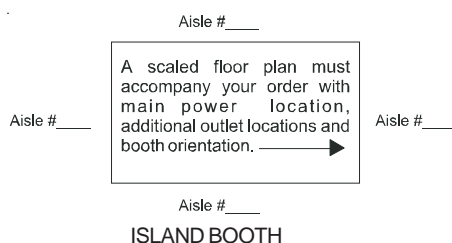
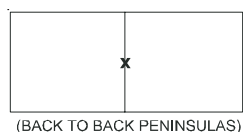
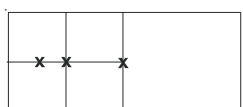
1. Order with payment & floor plan (for island booths or any booth requiring distribution of electrical services) must be received prior to the deadline date on the front of this form for advance payment rates to apply. Orders faxed or mailed without payment and required floor plan will not be guaranteed advance rates. Orders received after the deadline date will be charged at the regular rate. A purchase order or photocopy of a check are not considered valid forms of payment for securing advance rate.
2. In the event that the totals are calculated incorrectly on the front of this form, Edlen reserves the right to make the necessary corrections and charge the corrected amount. Exhibitors will be notified by fax of any such corrections.
3. Outlet rates listed include bringing the services to one location at the rear of all in-line or peninsulas booths. All services provided to island booths require labor and material for distribution. If floor plan showing main power location is not submitted prior to Edlen move-in date, Edlen will bring the main power to a convenient location at Edlen's discretion. Please refer to item #6.
4. Outlet rates listed **do not** include the connection of any equipment, special wiring, distribution of electrical services, or labor. Distribution from the power source to all other locations in a booth space *regardless of booth type* requires labor and is performed on a time and material basis. Exhibitors are invited to contact the local Edlen office to discuss any additional costs that may be incurred.
5. A separate outlet must be ordered for each location where electrical service is required. 5 amps or 500 watts is the minimum amount of power that can be ordered for any one location. Power must be ordered according to peak amperage ratings.
6. Labor rates are based on current wage scales and are subject to change in the event of a wage increase after rates have been published. A minimum charge of (1) hour labor will apply for all installation work. The removal of this work will be charged a minimum of 1/2 hour or 1/2 the total time of installation.
7. Edlen employees are authorized to cut floor coverings when essential for installation of services unless otherwise directed.
8. Edlen is the exclusive provider of all "rental" material & equipment used in the distribution of temporary electrical services throughout the exhibit hall including the exhibitors booth space. This material is provided on a rental basis ONLY and remains the property of Edlen. It shall be removed only by Edlen employees.
9. Any extension cords or power strips ordered on the front of this form should be picked up at the service desk.
10. Standard wall and other permanent building utility outlets or sockets are not part of the booth space and may not be used by exhibitors unless electrical services have been ordered through Edlen.
11. All equipment regardless of source of power, must comply with Federal, State and Local codes. Edlen reserves the right to inspect all electrical devices and connections to ensure compliance with all codes for which labor charges can be incurred. Edlen is required to refuse connections where the Exhibitor wiring or equipment is not in accordance with electrical codes.
12. All electrical equipment must be properly tagged and wired with complete information as to the type of current, voltage, phase, cycle, horsepower, etc... required for operation.
13. All Exhibitor's cords must be a minimum of 14 gauge, 3 wire and grounded. Two (2) wire extension cords are not allowed. All exposed non-current carrying metal parts of fixed equipment, which are liable to be energized, shall be grounded.
14. Payment in full must be rendered during the event. Exhibitors ARE NOT billed for services provided. Services may be interrupted if payment is not received.
15. Credit will not be given for service(s) installed and not used. All orders are subject to a 25% cancellation fee if cancelled in writing and received by Edlen within 14 calendar days of show opening. Edlen will not refund overpayment, except sales tax, in amounts less than \$50.00 unless specifically requested in writing
16. Claims will not be considered or adjustments made unless filed in writing by Exhibitor prior to the close of the event.
17. Exhibitor holds Edlen harmless for any and all losses of power beyond Edlen's control including but not limited to losses due to utility company failure, permanent power distribution failure, power failure caused by vandalism, faulty Exhibitor equipment or overloads caused by Exhibitor.
18. It is agreed that in the event it becomes necessary to turn this matter over to an attorney for collection, or to file a lien, or foreclosure, or otherwise, Exhibitor will pay Edlen its Attorney fees or applicable agency fees.
19. A service charge of 1.5% per month on any unpaid balances will be assessed starting 10 days after date of invoice. A \$25.00 service charge will be assessed for all returned checks and credit cards. Exhibitor agrees to reimburse Edlen for all applicable rental taxes.
20. By signing this form Exhibitor agrees to all terms and conditions on this order form.

## COMMONLY ASKED QUESTIONS - WHERE WILL MY OUTLET BE LOCATED

### HOW MUCH POWER DO I NEED?

1. Calculate the power for your lighting needs by totaling the wattage of your lights.
2. For other equipment, read the rating on the back or bottom of the unit (see example). The plate will tell you the amperage or wattage, voltage and phase requirements. Power must be ordered according to peak amperage ratings.

**WHERE WILL MY OUTLET BE LOCATED?** Outlets located as depicted below are for inline and peninsula booths. All other locations require labor on a time and material basis. Exhibitors with hard wall booths must make arrangements with Edlen to bring power inside the booth on a time and material basis.



**IF YOU HAVE ANY QUESTIONS, PLEASE CALL (619) 696-6625**



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THE CONSTRUCTION SPECIFICATIONS INSTITUTE &  
THE AMERICAN INSTITUTE OF ARCHITECTS



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and Sustaining  
the Built Environment

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**CONSTRUCTION PRODUCTS FAIRE AT DEL MAR**

-----co-sponsored by CSI and AIA-----

**WEDNESDAY, FEBRUARY 23, 2005**  
**3:00 PM – 8:00 PM**

**Mission Tower Room, Del Mar Fairgrounds (enter Solana Gate)**



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**1:00-3:45 PM ... GETTING LAID: Select, Spec and Install Flooring**

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*As a future Architect, this seminar is important. Learn what IDP is all about; then hear an Architect present valuable information for passing the orals to become an Architect.*

**COST: \$70.00 – CSI San Diego Chapter members; \$90.00 – non-members**

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**COST: \$70<sup>00</sup> – CSI San Diego Chapter mbrs; \$90<sup>00</sup> – non-mbrs**

<input type="checkbox"/>	<input type="checkbox"/>	1-3:45 PM seminar: GETTING LAID	NAME: _____
\$70 <sup>00</sup>	\$90 <sup>00</sup>		COMPANY: _____
<input type="checkbox"/>	<input type="checkbox"/>	2-5 PM seminar: GREEN	ADDRESS: _____
\$70 <sup>00</sup>	\$90 <sup>00</sup>		CSZ: _____
<input type="checkbox"/>	<input type="checkbox"/>	4-6 PM seminar: ARCHITECTS	PHONE: _____ FAX: _____
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**Minutes**  
**San Diego Chapter – CSI Board Meeting**



Knowledge for Creating  
and Sustaining  
the Built Environment

**Location:** Holiday Inn Mission Valley/Stadium  
 595 Hotel Circle South  
 San Diego, CA 92123  
 Phone: 858.614.1120

**Date:** Thursday, September 23, 2004  
**Called to Order:** 4:45 p.m.

Attendance		Position	Present	Excused	Absent
Mike Lugo	ML	President	X		
Gina Adams	GA	Vice-President		X	
Charlie Beach	CB	Secretary		X	
Phyllis Mosher	PM	Treasurer	X		
Tony Kam	TK	Advisor	X		
Dina Moyer	DM	West Region Director			X
Charlie Laughery	CL	Director		X	
Eric Soldau	ES	Director	X		
Barbara Faulwetter	BF	Director	X		
Brad Benson	BB	Director	X		
Kara DeLeon	KD	Director			X
Margy Ashby	MA	Executive Administrator		X	

**Approval of Minutes from June 2004 Board meeting:** Approved as written: Moved by PM, seconded by ES.

**Approval of Minutes from August 2004 Board meeting:** Approved as written: Moved by BB, seconded by BF.

**Correspondence:** PM has submitted her resignation for Treasurer. She is relocating to Oklahoma City, OK, in November.

**OFFICERS' REPORTS:**

**President [ML]:** SDCSI Chapter is under scrutiny for retention which is “poor.” **An email needs to be sent to all Board members, so that possible changes to the dues structure can be discussed at the October 28<sup>th</sup> meeting.**

Motion: Accept PM’s resignation. Moved by BB; seconded by BF.

Motion: Accept BB as new Chapter Treasurer. Moved by PM; seconded by ES.

ML suggested that a new Director should be brought on to the Board now that Brad Benson has moved to Treasurer and Awards Committee Chair. The Nominating Committee will develop a list of candidates.

**Vice-President [GA]:** No report.

**Secretary [CB]:** No report.

**Treasurer [PM]:** PM submitted P&L and Budget reports through July 1, 2004. Net Worth report as of September 23<sup>rd</sup> 2004 looks very good. (*See attached.*)

Motion: Approve financials. Moved by BB; seconded by BF.

**COMMITTEE REPORTS:**

**Programs [BF]:** She has programs set into 2005.

**Technical [BF]:** SpecTalks before meetings will be with an emphasis on new MasterFormat.

**SpecTickle [ML/MA]:** No report.

**Certification [GA]:** Testing on Wednesday, September 29<sup>th</sup> @ 1:00 p.m. during West Region Conference.

**Academic Affairs / Scholarship [CL]:** No report.

**Continuing Education [GA]:** No report.

**Products Fair [ML for JD]:** We have an unsigned contract for the Del Mar Fairgrounds for Friday, February 25<sup>th</sup>. This will be done in partnership with North County AIA again. **The contract needs to be signed and a \$3,300 deposit made.**

**Membership [CB]:** No report.

**Website [CB/MB]:** No report.

**Awards [BB]:** The Outstanding Chapter Award Application is **due December 1<sup>st</sup>**. We are applying for our 3<sup>rd</sup> OCA in a row. BB will be contacting each chairperson for help to get this done.

**Golf Tournament [CB]:** ML said it has been cancelled due to lack of people.

**50<sup>th</sup> Anniversary [DG]:** TK said he is working with Don Goertz on both City and County Proclamations for "SD-CSI Day" in recognition of its 50<sup>th</sup> Anniversary.

**WEST REGION REPORT [DM]:** No report.

**NEXT MEETING:** Thursday, October 28, 2004, 4:00 p.m. – Board Room at the Holiday Inn Mission Valley/Stadium

**ADJOURN:** Moved by PM; seconded by BF. Time: 5:27 p.m.

**Construction Specifications Institute  
West Region  
Annual Board Meeting - September 30, 2004  
San Diego, CA**

1. **Call to Order**

President Paulette Salisbury, FCSI, CDT called the meeting to order at 9:12 a.m.

**Roll Call:**

<u>OFFICERS</u>	<u>NAME</u>
President	Paulette Salisbury, FCSI, CDT
Vice President	Edmund C. Buch, CSI, CCS, AIA
Secretary	Sheryl Dodd-Hansen, FCSI, CCS
Treasurer	Robert Mosblech, CSI,
Advisor	John Patrick McCaffrey, FCSI, CCS, AIA
Advisor	Valarie Harris, CSI, CCPR
Student Representative	Sean McKeever, CSI-S

<u>CHAPTER</u>	<u>REGION DIRECTOR</u>
East Bay Oakland	Mary Nowee, RA, CSI, CCS
Fresno	Mark Harold, CSI, CCS, CCCA, AIA
Honolulu	Stephen Nash, CSI, CCS, CCCA, AIA
Los Angeles	Annette Wren, FCSI, CDT (Sue Brown, CSI present)
Monterey Bay	Jeanne Nunez, CSI (Not present)
Orange County	Not represented
Redwood Empire	Peter Stanley, CSI, CDT
Reno	Charlie Grundy, CSI, CCCA (Not present)
Sacramento	Duane Johnson, CSI, CDT
San Diego	Dina Moyer, CSI
San Francisco	Gus Tsopanakis, CSI, CDT
Santa Clara Valley	Michael O'Donnell, CSI

Also present: Institute President Gary Betts, FCSI, CCS, AIA; Past Director Joe Dworkin, FCSI, CDT; Theresa Cain, CSI from Los Angeles Chapter; Bryan Varner, CSI, CCCA, from Redwood Empire Chapter; Brian Cournoyer, CSI, CCS; Barbara Richardson, FCSI; Bea DeFuentes, CSI; Morris Gee, CSI, CCS, AIA from Sacramento Chapter; David Willis, CSI from Fresno Chapter; Austin Moore, CSI-S from Cal Poly, SLO Student Chapter; Eric Camin, CSI from Phoenix Chapter.

Adoption of Agenda - No objections; accepted.

Adoption of Special Rules of the Day - All motions must be presented in writing; no objections; accepted.

Recessed for Board Forum at 9:18 a.m. The purpose of this forum was to review, discuss, and evaluate in detail, in an informal atmosphere, the recommendations and issues on the Board agenda that might require extensive explanation. The format allowed those attending to satisfy concerns about agenda issues and be better prepared to address the issues during the formal Board meeting.

Topics:

Clarification of Current Budget Items for CSI-U and Convention: Bob Mosblech explained that the Institute Convention and CSI University were budgeted as two separate events totalling \$5,000 for FY 2004-2005; Institute has decided to combine the events in Chicago in April 2005; his proposal is to reallocate the remaining funds for the combined event, still not exceeding \$5,000.

Mid-Year Meeting Date and Location: Sheryl Dodd-Hansen presented arguments in favor of scheduling the FY2005 Mid-Year Meeting later in the year rather than the traditional end of January date, thus allowing opportunity to better plan for budgeting issues and to balance out the time between meetings.

Speak-Out and Forum Formats for Region Meetings: Paulette Salisbury noted the need for an agenda, possible sessions in both Northern and Southern California, and the possibility of having such sessions in conjunction with the Region Conference.

Clarification of Region Awards Program: Joe Dworkin summarized the changes that had been proposed in recent years, which would replace several legacy awards with one award, decreasing overall the number of possible awards from 21 to 12.

Region Directory Publication: Paulette Salisbury had Roylin Downs from McGraw-Hill Publications explain the Region Directory proposed for West Region.

Regional Technical Committee Initiative: Mary Nowee presented, on behalf of Henry Berg, discussion of the proposal to have a national council of Region Technical Chairs serving as a link to Institute Technical Committee and its activities.

Convention Caucus Purpose and Schedule: Paulette Salisbury discussed the time set aside at Institute Convention for Region caucuses.

Reconvened at 11:20 a.m.

2. **Approval of Minutes**

Minutes of Mid-Year Meeting, January 31, 2004, approved as written and distributed; motion (Nash); motion carried.

3. **President's Report**

Paulette Salisbury told about her experiences at the Institute Board meeting in June and some of the changes being made in CSI staffing (fewer) and the Membership and Academic Affairs Committees (Region Chairs comprising the committees). She recognized West Region members who are serving on Institute Committees and Task Teams. The Region has a new website through Tectonic Network and will be participating with McGraw-Hill Publications to produce a new region-wide services and products directory. She noted the improvements in the Speakers Bureau and media resource library, the progress of the Governance Documents Task Team, and the acquisition of Directors and Officers insurance. She congratulated Joe Dworkin and Matthew Boomhower for their success in helping to develop the outstanding leadership educational experience that is CSI University. And she reported on issues with regard to Membership and encouraged everyone to recruit new members.

4. **Vice-President's Report**

Ed Buch reported that his experience at the June Institute Board Meeting was positive, that people seem to have the best interests of the Institute uppermost in their minds, and that the staff is sharp. He has participated in several chapters' meetings and will be presenting a workshop on the Chapter Commendation Award, which is a valuable tool for self assessment of Chapter strengths and weaknesses.

Recessed for 20 minutes lunch break; reconvened at 12:25 p.m.

5. **Treasurer's Report**

Bob Mosblech presented balance sheets for 6/30/04 and 9/12/04, stating that the Region ended the previous fiscal year in good shape. There were \$2,400 in excess funds from the budgeted amounts that maybe could have been used to benefit the Region.

Bob recommended switching the Region bank account from Washington Mutual, which requires that all signatories to the account come to the same branch at the same time to sign signature cards, to Bank of America, which doesn't require that hassle. Motion (Dodd-Hansen) for the Board to authorize the Treasurer to move the bank account from Washington Mutual to Bank of America; motion carried.

Requests for reimbursement are supposed to be received within 60 days of the event; some legitimate requests have been late. Motion (Mosblech) that the deadline for submitting for reimbursement for expenses from the Mid-Year Meeting of January 2004 be extended to November 1, 2004 and not to exceed \$2,000 and funded from current reserves; motion carried.

Reminder that reimbursement forms should be sent to the Institute Directors, not directly to the Treasurer. Reminder that invoices for annual assessments will be sent to the Chapters as of 10/1 membership dates.

Further discussion of the budget and clarification of line item indicated for student fund (line 1560), which should have been transfer from reserves (line 1575). Motion (Mosblech) to remove Accounts Receivable line in the amount of \$9,329 (Orange County dues in arrears) from the Balance Sheet; motion failed.

Motion (Mosblech) to accept budget clarifications and reallocation of funds for Institute Convention and CSI University as shown in the attachment dated 9/30/04 (see Board Forum notes above); motion carried.

6. **Advisor's Reports**

John McCaffrey reported that he attended and enjoyed CSI University in San Antonio.

Valarie Harris has been helping the San Diego Chapter with Conference planning and registration; as Vice President of the Institute she is also Chair of the Institute Academic Affairs Committee.

7. **Student Representative's Report**

Sean McKeever from Cal Poly, San Luis Obispo reported that the student chapter has a new board, since many leaders go abroad to study; though school just started, they've had a retreat and are

planning events; may do combined trips with AIAS. Membership is basically the board members, so they are trying to increase membership. Four students enjoyed their experience at CSI University in San Antonio. The Construction Sciences Forum is scheduled for April 6, 7, and 8 of 2005 with a theme of "Architechnology" and they are looking for speakers. Update on Sam Harper - he got married during the summer and is doing an internship in Washington DC. Introduced Vice President Austin Moore.

#### 8. **Committee Reports**

Theresa Cain, Education Chair, reported that the Committee has two objectives this year: 1) To initiate, implement and facilitate a CSI and AIA certified Continuing Education Program about MasterFormat 2004, to be offered in several locations during the year, and to assist Chapters with their MasterFormat 2004 program needs; and 2) To establish continuity in each Chapter's Program Certifications with CSI and AIA by assisting Chapters with procedures to register their programs. Motion (Harris) that up to \$1,000 be allocated from reserve funds for Region Continuing Education on MasterFormat 2004; motion carried.

Brian Cournoyer, Finance Chair, reported that the audit of the books was conducted 9/1/04 and all is in order. He reported an issue with regard to a reimbursement check for President Salisbury, which requires one of the directors' signatures in addition to that of the Treasurer; he stated for the record that as a disinterested third party he advised Paulette to sign the check.

#### 9. **Task Team Reports**

D & O Insurance: Brian Cournoyer reported that it has been acquired; \$1,950 premium for the year; Board is covered retroactively as long as we acted in good faith.

Governance Documents Task Team: Sheryl Dodd-Hansen reported that after the Mid-Year Meeting, the comments from Chapters that had been summarized in the Governance Documents Spreadsheet, dated January 29, 2004, were incorporated into the Model Region Bylaws provided in the Institute Administrative References. The draft West Region Bylaws were distributed by email to Region Leadership (Board members, Region Committee Chairs, and Chapter Presidents) by Director Salisbury on September 18, 2004. Comments are welcome and Valarie Harris will be available to receive input at her workshop on Saturday afternoon.

Student Travel Fund: Valarie Harris reported that the fund began the year with \$4,250, of which \$1,800 helped send 4 students to San Antonio; \$1,800 is budgeted for Conference for 2 Cal Poly students and 1 Fresno State student, leaving a balance of \$650. Austin Moore from Cal Poly noted that the value of the contribution to student travel is the education of student leaders, networking opportunities, and early understanding of the organization.

#### 10. **Conference Committees**

2005 Sacramento - Morris Gee presented a proposed budget and schedule and requested seed money for the conference dated September 29 - October 1, 2005 in Old Town Sacramento; motion (Dodd-Hansen) to extend \$3,000 seed money to the Sacramento Chapter; motion carried. Morris was encouraged to benefit from input from the Region Conference Planning Committee.

2006 Monterey - In response to a question as to whether such a small chapter has the human resources to put on a region conference, Paulette suggested that the Region can organize the conference at Monterey's location, with Region committees to develop programs.

2007 Los Angeles - No report.

11. **Unfinished Business** - None.

12. **New Business**

Region Memorial Awards and Standardized Nomination Forms: Task Team of Joe Dworkin, Sheryl Dodd-Hansen, and Barbara Richardson to craft a plan and language for presentation at the Mid-Year Meeting.

Mid-Year Meeting Date: Motion (Dodd-Hansen) to schedule the FY2005 Mid-Year Meeting for March 2005; motion carried. Meeting tentatively set for March 12, 2005 in Oakland, CA.

Speak-Out and Forum Format for Region Meetings: Motion (Nowee) that a Region Speak-Out session be held during the West Region Conference at Sacramento; motion carried. Speak-Out at Mid-Year meeting to be held the evening before, as in the past.

McGraw-Hill Region Directory: Task Team of Stephen Nash and Paulette Salisbury will work with McGraw-Hill and the Chapters to compile data.

Region Technical Committee Initiative: Motion (Nowee) that the West Region Operating Guide, Section 12, Technical Committee, be modified as follows: Add the following new paragraph 5. Under C. Functions: "5. Participate in the national Council of Region Technical Chairs."; motion carried.

13. **Chapter Reports** - As distributed by East Bay-Oakland, Fresno, Honolulu, and Los Angeles.

14. **Announcements**

Get Well and Condolence Cards are available for messages to Jeanne Nunez, Bill Beck, and John Taylor's family.

Gary Betts shared his theme for the year: we need strong vital growing chapters if we're to have a strong, vital growing Institute. He encouraged the Region to support its chapters, to focus on them to make things happen, and work to benefit the Chapters. Encouraged the Region to help the small chapter host the conference; in North Central Region, rather than have a small chapter that didn't feel it could host a conference cancel, four chapters teamed up and put on a very successful event.

15. **Adjournment**

The meeting was adjourned at 4:10 p.m.

Sheryl Dodd-Hansen, FCSI, CCS - Secretary

**Construction Specifications Institute  
West Region  
Annual Members Meeting – October 1, 2004  
San Diego, CA**

1. **Welcome**

Region President Paulette Salisbury, FCSI, CDT began the meeting at 8:40 a.m. by introducing the Region officers, Directors, Fellows, Former Institute Directors, Members of Institute Committees and Task Teams, Former Presidents, Committee chairs, spouses, and all others who make CSI work. She congratulated the San Diego Chapter on their excellent efforts in hosting this Conference.

2. **President's Report**

President Salisbury gave highlights from yesterday's Board meeting. It went smoothly, as the new "informal board forum" allowed members to review, discuss, and evaluate in detail, in an informal atmosphere, the recommendations and issues on the Board agenda. She described the Region's new website, hosted by Tectonic Network; noted that CSI University in San Antonio was very good and hopes we'll send more Region leaders next April when it is held in conjunction with the CSI Show and Convention. The Mid-Year Meeting, tentatively scheduled for March 12, 2005, has been changed to occur in March next year, rather than the end of January, to better facilitate financial planning. Speak-outs will occur before the Mid-Year Meeting and at the Conference in September 2005. McGraw-Hill will publish a West Region Services and Member Directory as an enhancement to Chapter rosters. The President's full report to the Board is attached.

3. **Vice President's Report**

Vice President Edmund C. Buch, CSI, CCS, AIA reported that he enjoyed his first Institute Board meeting in June; he found the people there offering their best to the organization. He has visited the Fresno and Santa Clara Valley Chapters. He encouraged attendance at his Saturday workshop on the Chapter Commendation Award, noting that the process of preparing the documentation for the award is a valuable tool for self-examination and planning.

4. **Treasurer's Report**

Treasurer Robert Mosblech, CSI reported that the Region is in good fiscal health; the books from last year have been audited and closed. The Region spent less than its budgeted amount, but income is down and membership recruitment is a challenge. Reserves are about \$44,000, approximately twice the annual budget. If someone is interesting in advising about investments, please volunteer.

5. **Advisor's Report**

Valarie Harris, CSI, CCPR reported that the Governance Documents Task Team has been working for a couple of years on Region Bylaws; a draft is available for review and comment with the intention of adopting them at the Mid-Year Meeting. Then the Operating Guide will be revised.

6. **Student Representative's Report**

Austin Moore, CSI-S, Vice President of the Cal Poly CSI Student Club, provided an excellent update on the activities and enthusiasm of the student members. Four went to CSI University in San Antonio in July and two are benefiting from the networking and educational opportunities at this

Conference. The Construction Sciences Forum is scheduled for April 6, 7, and 8 of 2005 with a theme of “Architechnology.”

7. **Workshop Coordinator’s Report**

Sheryl Dodd-Hansen, FCSI, CCS encouraged everyone to take advantage of the opportunity tomorrow to hear about as many as six different leadership subjects at the Workshops in the Round. Sixteen leaders will present their subjects three times as participants rotate among the various topics. It will be exciting and informative.

8. **Region Conference Update**

Accompanied by Jazz-inspired kazoo performers, the Sacramento Chapter Conference Committee presented a rousing version of “Sacramento, Here We Come” and an entertaining slide show about next year’s Transportation-themed Conference in Sacramento “Where It All Comes Together”.

9. **Announcements and Adjournment**

After announcements and moments of silence for those who are not with us, but are held in our hearts, the meeting was adjourned at 9:45 a.m.

The following Institute Reports were given:

Gary Betts, FCSI, CCS, AIA, Institute President, told us that lots of things are going on, with long-term projects coming to fruition, including the Project Resource Manual - CSI’s Manual of Practice, and the expanded MasterFormat. Sweets Catalogs for 2006 will conform to MasterFormat 2004; Speclink has already converted. Other projects include updating Section and Page Format. The Program Development Task Team is charged with developing for next Spring both Construction Specifier and Contract Administrator Academies based on format of the Product Representative Academy. Gary shared his theme for the year: we need strong vital growing chapters if we’re to have a strong, vital growing Institute. He encouraged the Region to support its chapters, to focus on them to make things happen, and work to benefit the Chapters.

Karl Borgstrom, PhD. – CSI Executive Director – reported that the decision to combine CSI University with the Convention next year is a winner, as it is getting leadership education back with the Annual Meeting. It will be in April another year and then back to June. CSI has a tacit agreement with AIA that we’ll move around the country and not end up in the same city again. Our strength is education and training. Problems of some misunderstandings in AIA about MasterFormat 2004 seem to have been resolved. Karl will present a session Saturday morning on Membership promotion efforts.

Sheryl Dodd-Hansen, FCSI, CCS – Secretary

West Region CSI  
Director's Report  
Paulette Salisbury, FCSI, CDT  
Institute Director, Industry  
Sept. 29, 2004

Since taking office in February of this year, I have been privileged to represent the West Region at the Institute Board meeting in Alexandria, VA in June. Along with Ed Buch, incoming Director, we were given a tour of the CSI offices where we met many of the staff supporting all the projects and services of CSI.

The CSI headquarters leases 18,000 sq ft of space. At the time of our visit, they were undergoing an interior retrofit to accommodate a sub-tenant for 6,000 sq. ft. of the space. At the time, CSI employed 34 people, 4 of whom were new, with 5 vacant positions for a total goal of 39 staff members. This is a significant cost reduction from prior years having as many as 55 employees some years ago.

As you have noticed in the West Region Corner column that Ed and I write each month for the Chapter newsletters, additional modifications have been made in the way CSI does business. The staff has been diligent in reducing costs where ever possible and trimming any excess spending at every opportunity to make us more financially stable as a corporation.

We sit on the board of a \$5 million corporation. And we take this responsibility very seriously, making decisions for the health of the entire organization not solely for the region we represent. The Institute is many times more complex than serving on the Region or Chapter Board. While many of the issues are similar, the outcome of the deliberations has impact on 18,000 members and the future of the entire organization. While there are significant challenges to be faced, I am giving my best to CSI. In addition to my responsibilities as a Director, I am serving the Institute on the MasterFormat Implementation Task Team.

This year the Institute has incorporated the Region chairmen into the Institute committee of Membership and Academic Affairs. This change encourages the grassroots ideas and energy to be more effective in establishing new programs and services for members. We are pleased to recognize two of our finest leaders as members of the Institute Membership and Academic Affairs Committees. We are looking forward to seeing your visions become reality. I know you will both grow from your involvement with the other dynamic members of CSI from around the country. As all of you know who have served the Institute, the relationships formed can be long lasting and rewarding.

I'd like to recognize the other volunteers from the West Region who are giving selflessly of their time and talents to serve on Institute committees or Task Teams.

Sheryl Dodd-Hansen, FCSI, CCS	MFITT
Michael Chambers, FCSI, CCS, FAIA	Chairman, MFITT
Michael Chusid, FCSI, CCS	MFITT
Joe Dworkin, FCSI, CDT	Chrm. Programs Development Task Team
Bryan Varner, CSI, CCCA	Membership Committee
Mathew Boomhower, CSI, CDT	Academic Affairs Committee
Jan Piccola, CSI	Awards Committee
Barbara Richardson, FCSI	Awards Committee
Bill Buchholz, CSI, CCS, AIA	Certification Committee
Henry Berg, FCSI, CCS, CCCA	Chairman, Technical Committee
Jack Klemeyer, FCSI	Nominating Committee
Annette Wren, FCSI, CDT	Corresp. Mbr. Educ. Doc. Development TT

Alan Tokugawa, CSI, CCS  
Valarie Harris, CSI, CCPR

MOP Editorial Advisory Board  
Chr. Academic Affairs, Vice President

#### Web Site

You may have noticed a new look to our region website. Thanks to Tectonic Network, we have a completely new communications tool at our disposal. As with any new product, it is still under construction and all of the tabs or buttons are not completed, yet. But there is room to post news of all our Region committee and activities. So each committee chairman has a responsibility to post articles or newsworthy information on the site. It will also act as an e-newsletter to all members of the Region. Tectonic Network has arranged to e-blast each of the 1800 members who have email addresses listed with the Institute a short introductory message inviting them to link to the [www.westregioncsi.org](http://www.westregioncsi.org) site to view our current newsletter.

As the website gains traffic, vendors will want to display their support of CSI as a banner ad on the site. We have worked out an agreement with Tectonic to share the revenues of this advertising. In this way the Region may have a modicum of income from ad sales. Susan Fitzsimmons of Tectonic will be participating in the Conference as a workshop leader and you may ask her questions about the details of the potential revenue sharing. I will also be happy to address your concerns.

#### Region Directory with McGraw Hill Publications.

In the early spring, McGraw Hill Publications came to me with a proposal to publish a region-wide services and products directory. I have been working with Michael Moffat and Roylin Downs of McGraw Hill to make this communications tool a reality. Ms Downs will be on hand later in the day to make a brief presentation to the Board regarding the potential for promotion of CSI, the member benefits and the possible revenue generation of this publication. I have a sample to share with you of the award winning Directory produced by the Northwest Region and McGraw Hill. The Northwest has been publishing this document for several years with great success. We have some testimonials for your review. Both professional members and product reps will benefit from this additional exposure.

It will be of utmost importance that each chapter supply our region coordinator with current member listings and Division listings as appropriate. We are looking for your assistance in collecting this important member information in time for our projected publication date of January.

#### Speakers Bureau and Media Center.

Julie Brown has been working diligently on improving the Speakers Bureau and newly launched media library. You are probably familiar with the concept of a speakers' bureau, but it has been expanded to categorize speakers by those willing to travel and those not. The media library works on a simple principal. Audio or video tapes or cd's of technical information or presentations on leadership or issues of interest to CSI members will be cataloged in the media library. A list of these resource materials will be posted on the web site. If a members wishes to check out any of these resources, he or she will be directed to contact the owner of the item and arrange for shipping. When the viewer has completed their use, the item will be shipped back to the owner. In this way we can each keep track of our own materials, but also make them available to share with others.

#### Directors and Officers Insurance

At the mid-year meeting, a task team was charged with establishing D&O insurance policy for the Region Board of Directors. The policy has been written and coverage established. Thanks to Bryan Varner and

Brian Cournoyer for dealing with this important issue on our behalf. Bryan Varner will give a detailed report.

## GDTT

The Governance Documents Task Team has established a draft of the Region Bylaws for review. I am pleased to announce that this first draft is available for your comment at the workshop in the round table on Saturday. Please read it and write your comments on the ledger so that they can be captured for consideration of the GDTT.

This set of Bylaws has been drawn to differentiate the foundation of the corporation which remains relatively permanent from the operating procedures that may be modified to suit business conditions.

Keep in mind that this document will become the official structure of the Region. It is not intended to supercede the Operating Guide which sets forth the policies and procedures for administration of the region's business. In short, the Articles of Incorporation of the Region, registered with the Secretary of State in 1979 establish the Operating Guide as the Bylaws of the West Region. When these Bylaws are adopted, they will become a part of the existing Operating Guide. Further definition of the duties of officers and committee chairmen as well as the administrative procedures of the region will be detailed in subsequent sections of the Operating Guide.

We hope to approve the Bylaws portion of this work at the Midyear Meeting. Then the task team will begin work on a complete overhaul of the Operating Guide. In the meantime, the Operating Guide will stand as written and govern the actions of this Board.

## CSI University

This year at CSI U in July in San Antonio TX, the West was well represented by at least 24 of the Best and Brightest. Joe Dworkin and his team including Matthew Boomhower developed an outstanding leadership educational experience. CSI U is the best program for leaders at any level of service in their CSI career. There is even something unique for some of us "seasoned veterans" plus the invaluable networking between events. I hope the R Region will be able to send even more rising leaders to attend in Chicago this spring.

## EPB

We have begun a dialog with the California State Architect regarding his Excellence in Public Buildings initiative. We have a member on the Super Partnering Forum and Ed Buch and Dane Dodd-Hansen are representing our Region in this capacity. More details will be forthcoming on the Region Website under the CA Liaison button. In addition to the general initiative there is a special task force for environmental Ly preferred products. All manufactures should participate in this industry forum as it relates to establishing the highest of quality standards in building products. We are looking for additional members to supplement this committee and act as industry liaisons with the State.

## Membership

This is the area that most concerns me. The Region Retention rate is at 81.7% according to the Aug. 21 report. We have 1598 home chapter members and 311 non-affiliated members for a total of 1909 members in the Region. We are the second largest region in number of members behind North Central with 2495. Much of our time during this conference will be devoted to membership issues. The overall trend in the Region and Institute is down. Since July 1999 Institute Membership peaked in January 2000 at 18,500. It has steadily declined to a record low since 1999 of about 16,400 members in June of this

year. This is an alarming trend and must be reversed if we are to survive as a professional organization.

Each one of us must recruit new members. It is not up to the Chapter Membership chairman or the Region Membership Chairman or the Institute committee to bring in members. It is up to US. Bryan Varner has some exciting challenges for us at the workshop roundtable on Saturday. I encourage all of you to stop by and find out how you can take the leadership challenge...after all "Leadership is NOT a Spectator Sport".

#### Chapter Visits

In the spring, I visited the Reno Chapter to assist their small band of members in reviving the Chapter. I was encouraged by the spirit of new leaders including Chapter President Brian Lindsay. He attended CSI U and came away with some new energy to inspire his Chapter. At their officer installation in late June, I was pleased to see several new members committing to join the Chapter. Since this chapter's membership is mostly folks with loyal ties to other home chapters, obtaining a true picture of how many local (Reno based) construction professionals belong to the chapter is a challenge. I am hopeful that Charlie Grundy and Brian Lindsay and the other loyal volunteers can spark some new growth with the assistance of some of the Region workers. Several educational programs or seminars are planned for the fall to invite area construction professionals and potential members to learn about CSI technical products including MasterFormat 2004.

I was honored to install the officers and boards of Redwood Empire Chapter and San Diego Chapter this spring. It is one of the real treats for me to be invited to challenge and hopefully inspire the new leaders of the Chapters. The oath of office we take as Chapter leaders is a bond we share in service to CSI.

It is a privilege to serve the Region as Director. I hope to live up to the trust you have placed in my leadership.